

# New product launches\* underway across respiratory, HIV, oncology, vaccines and diabetes



Market definition	Respiratory Controller: ICS/LABA	Respiratory Controller: Bronchodilator	Metastatic Melanoma V600	HIV total	Seasonal Flu Vaccines	Type 2 Diabetes GLP-1
Global market size	£8.5 bn	£4.9 bn	£0.4 bn	£12.3 bn	£2.0 bn	£2.0 bn (£1.4 bn in US)
Current US market share	TRx: Advair: ~58% Breo Ellipta: ~1.4%	TRx: ~1%	~75% combined TRx share of V600	19% of naive, add, switch for 3 <sup>rd</sup> agent/STR**	~65% of 3y+ QIV injection market in 2013/2014 season	TRx: ~0.8%
Access % US pts Tier 2/3 unrest.	~50% Commercial ~72% Part D	~80% Commercial ~50% Part D	~98-100% Favourable Access	~100%**	~98% Commercial 100% VFC	~76% Commercial 0% Part D
US Physician coverage	98% aware (aided)	94% aware (aided)	~55%	>95%**	Nearly 100%	69% aware 97% among Endos (aided)
Key US market share data	NBRx: ~4% All HCP ~11% Pulmonology	NBRx: ~4% All HCP ~10% Pulmonology	~75% combined NRx share of V600	Naive: 13%** Switch: 24%**	<25% of US was estimated QIV in 2013/14 season	NBRx: ~4% All HCP ~5% Endo
Key Markets with price/reimbursement	Recently launched in >20 markets in EU, 4 EM, Japan	Recently launched in ~9 markets globally, including UK, Germany & Japan	Tafinlar launched in EU. Mekinist approved in EU	Tivicay & Triumeq launching in US, EU. Tivicay launching in Japan	Launching in some EU and EM markets	Eperzan approved in EU

\*Incruse US launch activities expected in late 2014 and Arnuity in 2015. \*\*Tivicay only data. Triumeq launched late Q3 2014.

Sources: IMS Health Data MAT June 2014; IMS Health Weekly Rx trends; Symphony Health Solutions; IPSOS HIV Scope; GSK estimates and CDC data.

## Pipeline Progress Since Q2 Results

### Approvals

*Flonase* allergy relief for sale OTC (US)

*Arnuity Ellipta* for asthma (US)

*Promacta* for severe aplastic anaemia (US)

*Triumeq* for HIV (US and EU)

### Filings & Related Updates

EU regulatory submission for malaria vaccine candidate RTS,S

### Key pipeline news updates

Announced +ve interim results for *Arzerra* PROLONG study as maintenance treatment for relapsed CLL

+ve data from Ph III MENSEA & SIRIUS studies of mepolizumab in severe asthma presented at ERS and published in NEJM

+ve data from Ph III AMBITION study of *Volibris* (ambrisentan)+ *Adcirca* (tadalafil) combination use in PAH

Announced two-year landmark overall survival data from Ph III BREAK-3 study of *Tafinlar* in metastatic melanoma

Announced start of Ph III study of s.c. ofatumumab in pemphigus vulgaris.