

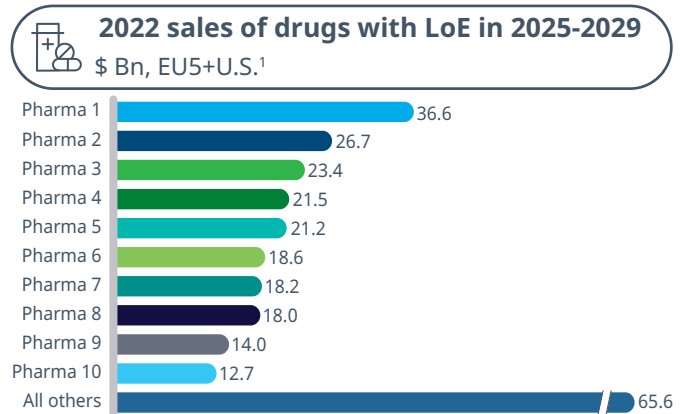
IQVIA Established Brands Optimization

Unlock established brands value

Established brands represent the majority of portfolios across pharma’s global affiliates that are often neglected, with revenue and profit growth untapped. In the coming period, pharma should witness a complete transformation as loss of exclusivity (LoE) to 569 medications valued at \$278 Bn (2022 sales) are set to expire by 2029/2030.

Big pharma is poised to lose market exclusivity for top-selling drugs worth \$278 Bn in 2022, between 2025 to 2029.

Replicating this revenue with new launches is increasingly uncertain as current market dynamics pressure revenue and profit margin, meaning pharma affiliates need to nurture their established brands revenue streams and ultimately maintain their market capitalizations.



Challenging market dynamics increase revenue and profit margin pressures caused by LoE

- Economic cost of launches** — New brand spending is expected to total \$198 Bn between 2024-2028 compared to \$153 Bn in 2019-2023
- Market competition** — An estimated 30% of Loss of exclusivity impact will be due to the availability of biosimilars
- Pricing pressures** — Inflation reduction act provisions create medicare event horizons at nine years for small molecule drugs and 13 years for large molecule drugs²
- Supply chain disruptions** — Supply chain issues alone are estimated to account for \$5 Bn in lost revenue³
- Regulatory compliance** — The U.S. Food and Drug Administration (FDA) has implemented 2,000 new or modified regulations since 1998 and there are over 150 country level regulators globally

¹IQVIA Internal Analysis; ²IQVIA, The Impact of the Inflation Reduction Act on the Economic Lifecycle of a Pharmaceutical Brand, 2024; ³IQVIA Insight Brief, The Drug Supply Chain Security Act (DSCSA), 2024

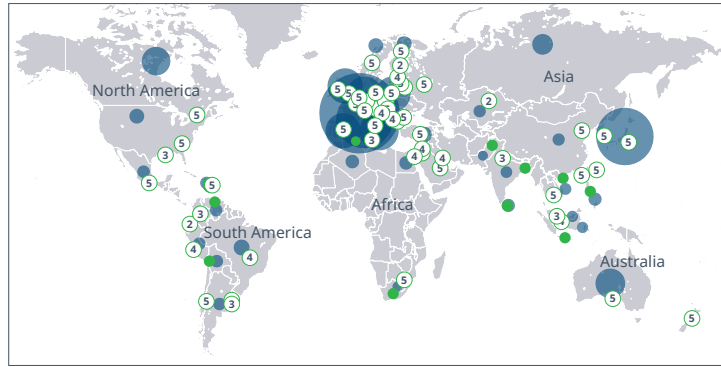
Deploying the right established brand strategy is imperative to optimize revenue

The traditional established brand strategies might appear simple, but the globalization of these brands introduces complexity.



Whatever the path taken for established brands, organizations need to consider market conditions, as well as strategic and operational factors.

Global presence of 5 established brands for a leading pharmaceutical company in 2024¹



¹IQVIA Internal Analysis

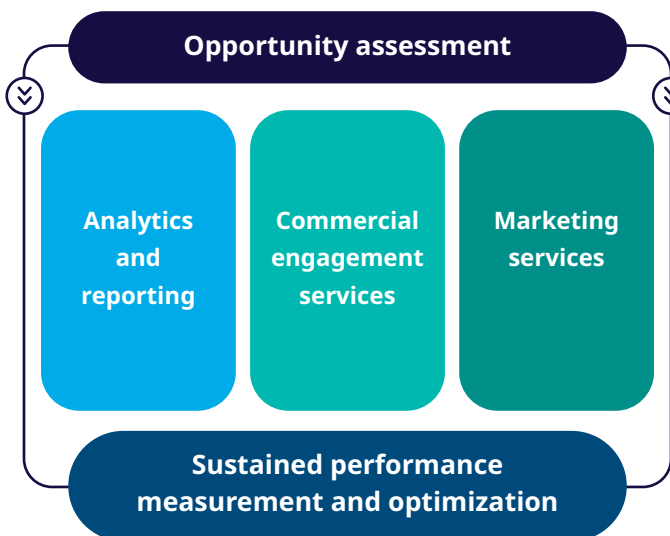
Discover IQVIA established brands optimization, a connected approach to unlock your brand potential.

IQVIA's unique five step consultative approach helps you to understand, plan and execute the right strategy to revitalize your brand profitability and growth in late commercial phases.



Once you learn the best strategy and optimal capability mix for execution, IQVIA is here to support the execution along your journey. IQVIA provides a broad range of leverage points to optimize established brands portfolio including co-promotion and commercial partnership models, from Fee-for-Service to Risk-Share, depending on the project nature.

IQVIA is fully equipped to provide end-to-end support across all foundational success factors



Gain a clear and confident approach for established brand portfolio

IQVIA Established Brands Optimization helps to determine the best course of action to revitalize your brand profitability and growth in late commercial phases. Contact us today to learn more about IQVIA Established Brands Optimization. Please visit our web page or email the EBO Center of Excellence team directly, see below in contact us.

CONTACT US

Visit our [IQVIA Established Brand Optimization webpage!](#)

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