

NK-1 market model



LEERINK SWANN

- With nausea benefit

	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>
<u>Nausea benefit</u>										
# of CINV trx (MM)	6.6	6.6	6.6	6.6	6.6	6.6	6.6	6.6	6.6	6.6
% eligible	75%	75%	75%	75%	75%	75%	75%	75%	75%	75%
# eligible	5,000,000	5,000,000	5,000,000	5,000,000	5,000,000	5,000,000	5,000,000	5,000,000	5,000,000	5,000,000
% NK-1	12.3%	13.8%	17.6%	21.5%	25.2%	28.9%	32.9%	36.9%	40.7%	44.0%
# NK-1	613,587	689,571	878,698	1,074,784	1,260,000	1,445,000	1,645,000	1,845,000	2,032,500	2,200,000
market growth		12.4%	27.4%	22.3%	17.2%	14.7%	13.8%	12.2%	10.2%	8.2%
% Emend				100%	100%	100%	89%	77%	61%	47%
% Netupitant						3%	7%	7%	9%	11%
% Rolapitant				0%	0%	0%	5%	16%	30%	42%
# Rolapitant courses						3,800	79,075	297,700	611,100	914,500
Rolapitant cost						\$300	\$315	\$331	\$347	\$365
price increases										
US rolapitant Sales (\$MM)						\$1	\$25	\$98	\$212	\$333
OUS rolapitant Sales (\$MM)							\$12	\$49	\$106	\$167
WW rolapitant Sales (\$MM)						\$1	\$37	\$148	\$318	\$500

Source: Leerink Swann estimates