

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



Market definition	Respiratory Controller: ICS/LABA	Respiratory Controller: Bronchodilator	Metastatic Melanoma V600	HIV total	Seasonal Flu Vaccines
Current global market size	£8.5 bn	£4.8 bn	£0.4 bn	£12.3 bn	£2.0 bn
Current US market share	<i>Advair</i> : ~60% <i>Breo Ellipta</i> : ~1%	<i>TRx</i> : ~0.6%	~72% combined TRx share of V600	16.5% of naive/add/switch for 3 <sup>rd</sup> agent/STR	~65% of 3y+ QIV injection market in 2013/2014 season
Access % US pts Tier 2/3 unrest.	~50% Commercial ~70% Part D	~75% Commercial ~30% Part D	~93% Favourable Access	~99%	~98% Commercial 100% VFC
US Physician coverage	99% aware	86% aware	~44%	>95%	Nearly 100%
Key US market share data	NBRx: ~4.5% All HCP ~11.5% Pulmonology	NBRx: ~3.7% All HCP ~9.5% Pulmonology	~72% combined NRx share of V600	Naive: 11% Switch: 22%	<25% of US was estimated QIV in 2013/14 season
Key Markets with price/reimbursement	Launching in EU & Japan	Launching in EU & Japan	Approved in EU	Launching in EU & Japan	Launching in some EU and EM markets

\*Tanzeum/Eperzan and Incruse launches expected in 2H 2014

Sources: IMS Health Data MAT Sept 2013; IMS Health Weekly Rx trends; Symphony Health Solutions; IPSOS HIV Scope; GSK estimates and CDC data.

# Pipeline Progress Since Q1 Results

## Approvals

*Incruse* for COPD (US)  
*Anoro* for COPD (Europe)  
*Arzerra* for first line treatment of CLL (EU)  
*Anoro* for COPD (Japan)  
*Mekinist* for metastatic melanoma (EU)

## Filings & Related Updates

Filed *Incruse* for COPD (Japan)  
 CHMP positive opinion for *Triumeq*  
 (dolutegravir+abacavir+lamivudine);  
 Filed *Breo* for asthma (US)

## Key pipeline news updates

darapladib SOLID study did not meet primary endpoint  
*Arzerra* ORCHARRD study in DLCBL did not meet primary endpoint  
 Data from studies comparing *Incruse+Advair* to *Advair* alone in COPD presented at ATS  
*Tykerb/Tyverb* ALTTO study did not meet primary endpoint  
 Start of phase III programme for losmapimod in ACS  
 Positive data from two studies comparing *Incruse+Relvar/Breo* to *Relvar/Breo* alone  
 Collaboration with Janssen over development of FDC once daily pill of dolutegravir+rilpivirine  
 Positive data from phase III PETIT-2 study of *Promacta* in paediatric patients with cITP  
 Presented three year data from *Eperzan/Tanzeum* HARMONY studies at ADA  
 Start of phase III SUPPORT study for *Promacta/Revolade* in myelodysplastic syndrome  
*Arzerra* study in bulky fludarabine-refractory CLL did not meet primary endpoint  
 Start of Phase III IMPACT study of FF+UMEC+VI triple combination in COPD  
 COMBI-v head-to-head study of trametinib+dabrafenib vs *Zelboraf* stopped early by the IDMC as it met pre-specified efficacy criteria