

## Increasing demand for healthcare

### Global pharmaceutical sales

As shown in the chart on the right, global pharmaceutical sales grew by 4.4% in 2018. Established Markets saw an average revenue increase of 3.9% and Emerging Markets revenue grew at 6.4%. The US, China, Japan, Germany and France are the world's top five pharmaceutical markets by 2018 sales. In 2018, the US had 47.2% of global sales (2017: 47.2%; 2016: 47.7%).

#### World (\$bn)

2018	982
2017	940
2016	916

**\$982bn** (4.4%)

#### US (\$bn)

2018	464
2017	444
2016	437

**\$464bn** (4.5%)

#### Europe (\$bn)

2018	196
2017	187
2016	182

**\$196bn** (4.8%)

#### Established ROW (\$bn)

2018	110
2017	110
2016	113

**\$110bn** (0.1%)

#### Emerging Markets (\$bn)

2018	211
2017	199
2016	185

**\$211bn** (6.4%)

// Denotes a scale break.

Data based on world market sales using AstraZeneca market definitions as set out in the Market definitions on page 239. Source: IQVIA, IQVIA Midas Quantum Q3 2018 (including US data). Reported values and growth are based on CER. Value figures are rounded to the nearest billion and growth percentages are rounded to the nearest tenth.

### Estimated pharmaceutical sales and market growth – 2022

The table on estimated pharmaceutical sales and market growth to 2022 on the right also illustrates that we expect the established markets in North America and developing markets, including Africa, CIS, Indian subcontinent and Latin America, to fuel pharmaceutical growth. Market growth in China is expected to remain below historical levels at a compound annual growth rate of 4.6%. This is due to the continued slowdown of the major hospital sector.

#### North America

Estimated pharmaceutical sales – 2022	\$635bn
Estimated pharmaceutical market growth	5.4%

#### EU

Estimated pharmaceutical sales – 2022	\$280bn
Estimated pharmaceutical market growth	3.1%

#### Other Europe (Non-EU countries)

Estimated pharmaceutical sales – 2022	\$25bn
Estimated pharmaceutical market growth	10.3%

#### Japan

Estimated pharmaceutical sales – 2022	\$90bn
Estimated pharmaceutical market growth	-1.5%

#### Oceania

Estimated pharmaceutical sales – 2022	\$16bn
Estimated pharmaceutical market growth	1.1%

#### South East Asia and East Asia

Estimated pharmaceutical sales – 2022	\$205bn
Estimated pharmaceutical market growth	4.9%

#### Latin America

Estimated pharmaceutical sales – 2022	\$78bn
Estimated pharmaceutical market growth	7.8%

#### Africa

Estimated pharmaceutical sales – 2022	\$26bn
Estimated pharmaceutical market growth	7.3%

#### CIS

Estimated pharmaceutical sales – 2022	\$29bn
Estimated pharmaceutical market growth	8.0%

#### Middle East

Estimated pharmaceutical sales – 2022	\$23bn
Estimated pharmaceutical market growth	3.9%

#### Indian subcontinent

Estimated pharmaceutical sales – 2022	\$38bn
Estimated pharmaceutical market growth	10.0%

■ Estimated pharmaceutical sales – 2022. Data is based on ex-manufacturer prices at CER. Source: IQVIA.  
■ Estimated pharmaceutical market growth. Data is based on the compound annual growth rate from 2017 to 2022. Source: IQVIA.