



Rx Sales Trends over the Decades

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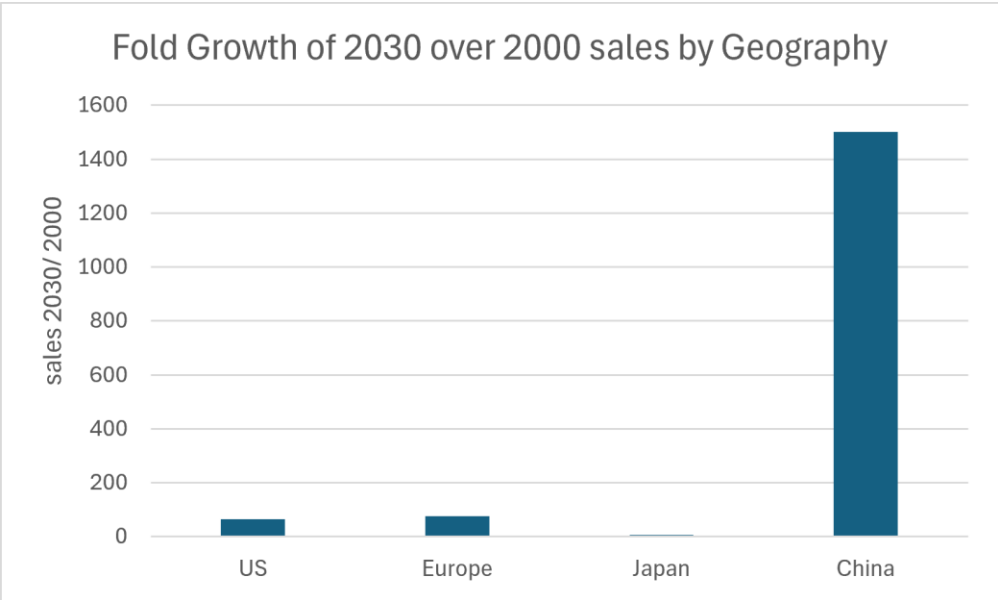
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Rx Sales Trends: What the Charts Show

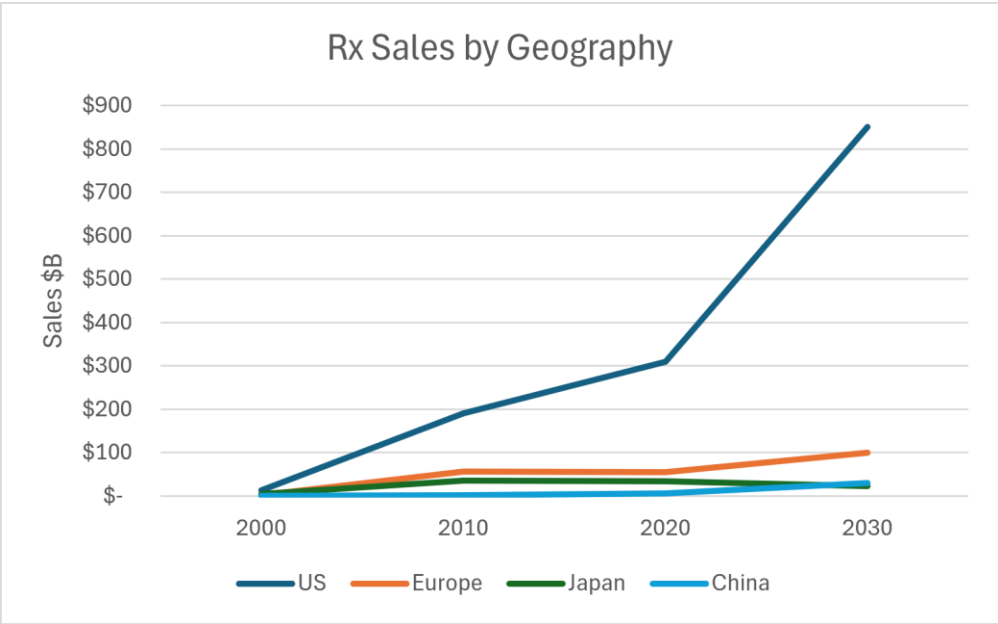
This piece reviews long-term trends in prescription drug sales using GlobalData figures. The charts highlight which markets are expanding, where sales remain concentrated, and how growth is shifting across therapeutic areas, molecule types, leading products, and top companies.

Market growth: China shows the fastest growth of the major markets, while the U.S. is expected to remain the largest market through 2030.

The growth of a given geography is driven by population (especially an aging population) and middle class wealth. The fastest growth rates are expected to be in emerging markets such as Turkey, India and Brazil ([Iqvia](#)).



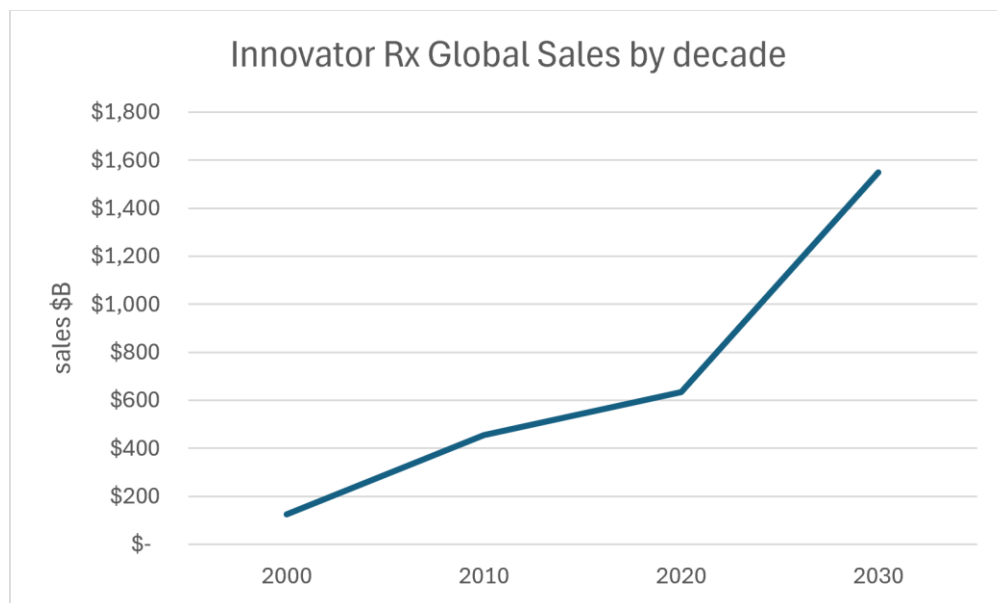
U.S. Sales Remain Dominant Through 2030



Innovator Drugs Drive Most Growth

Most of the projected growth comes from innovator products, reflecting continued investment in new therapies and differentiated formulations.

Note: GlobalData's innovator category includes new molecular entities as well as other innovations, such as new formulations.

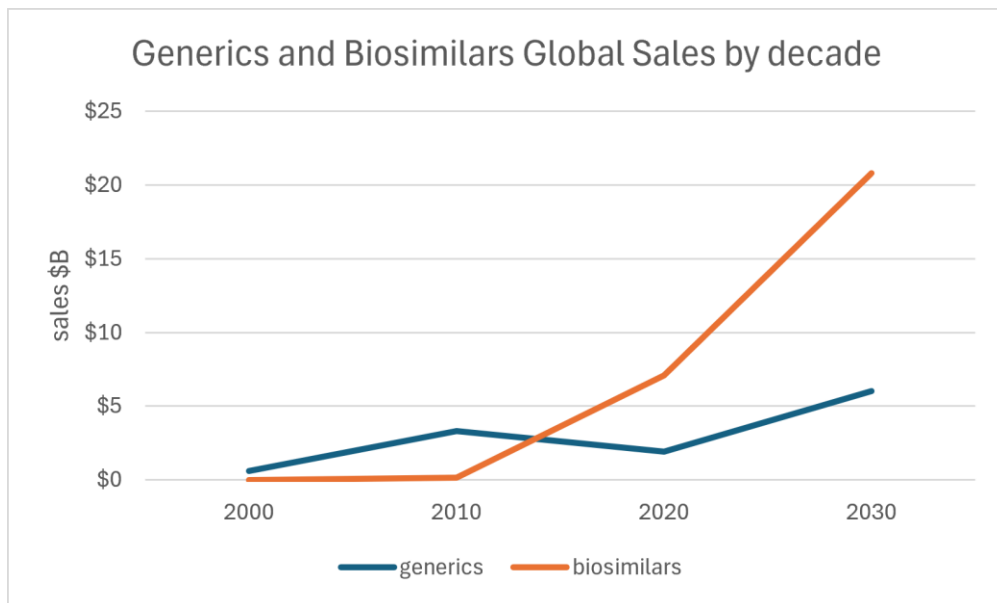


Generics and Biosimilars Remain Smaller, but Biosimilars Are Growing

Generics and biosimilars represent a much smaller share of sales than innovator drugs, but biosimilars are gaining momentum over time. Biosimilars growth reflects regulatory recognition in the US and

Europe and biosimilars are most common in high sales areas such as oncology, immunology.

Note: The innovator and generics/biosimilars charts use very different y axis scales; growth in biosimilars and generics would be almost invisible on the scale of innovator drug sales.



Therapeutic Areas Are Shifting with Oncology Dominant

Mortality burden does not always align with drug sales. While cardiovascular disease and cancer are among the leading causes of death globally, the largest-selling therapeutic areas have changed over time.

Major global causes of mortality include:

- Cardiovascular disease, at roughly 20 million deaths annually worldwide
- Cancer, at roughly 10 million deaths annually
- Chronic respiratory diseases, including COPD
- Diabetes and kidney disease
- Dementia and Alzheimer disease

In sales terms, CNS led in 2000 and 2010, but oncology became the largest therapeutic area in 2020 and is forecast to remain the largest in 2030. Metabolic diseases (obesity) and dermatology are also growing quickly.

The shift in therapeutic area focus reflects, in part, a shift to earlier diagnosis with **biomarkers and AI in diagnosis** leading to **earlier and longer treatment**.

- In **oncology**, treatment with chemotherapy was focused on systemic treatment of metastatic disease. Today, mutations guide selection of treatments and there is adjuvant and neoadjuvant treatment, meaning more years of treatment.
- Intriguingly, dividing a disease into **multiple subtypes** with biomarkers means more drugs can be successful, expanding the total market.
- In **CNS**, AI enhancement of MRI, PET and CT scans enable earlier diagnosis of Alzheimers and other disorders.

- In **obesity**, drug treatment used to be largely confined to treating the consequences of obesity such as diabetes, sleep apnea and kidney disease. Today obesity is viewed as a chronic disease for early intervention.
- **Higher efficacy in biomarker-defined subtypes** generally leads to greater cost effectiveness and support higher prices.

Sales by Therapeutic Area

	2000	2010	2020	2030
oncology	10	58	157	414
Immunol	3	32	85	178
metabolic	13	59	71	273
CNS	27	87	70	161
infectious	16	44	56	98
CV	18	54	47	59
respiratory	8	38	41	69
Heme disorders	3	12	20	47
ophthalmology	1	10	17	36
GI	14	15	15	37
musculoskeletal	2	10	9	24
Hormonal	2	8	8	15
toxicology	1	10	7	3
women's health	2	6	6	0
derm	1	2	5	51
GU	2	7	5	16
genetic disorders	0.1	0.7	4	21
nutritional disorders	0	1	1	3
mouth & dental	0	0	0	0.3
non-malignant (benign, precancer)	0	0	0	1

Molecule Types Are Shifting Beyond Small Molecules

Small molecules continue to dominate, but growth is increasingly coming from antibodies, peptides, antibody-drug conjugates, and vaccines. Delivery technologies have been critical (e.g., subcutaneous formulations of antibodies).

By 2030, ADCs and vaccines are expected to become more visible contributors, broadening the mix beyond traditional small-molecule products. These newer modalities often promise greater specificity and efficacy for biomarker defined subtypes of disease.

Sales by Molecule Type

	2000	2010	2020	2030
small molecules	\$ 105	\$ 317	\$ 332	\$ 603
Ab	\$ 1	\$ 45	\$ 162	\$ 431
peptide	\$ 5	\$ 15	\$ 31	\$ 185
vaccine	\$ 0	\$ 12	\$ 24	\$ 58
fusion protein	\$ 1	\$ 8	\$ 22	\$ 44
enzyme	\$ 0	\$ 6	\$ 13	\$ 26
blood derivative	\$ 0	\$ 2	\$ 6	\$ 30
ADC	\$ 0	\$ 0	\$ 4	\$ 61
polysaccharide	\$ 1	\$ 5	\$ 2	\$ 2
cell therapy, gene mod. cell therapy	\$ -	\$ 0	\$ 1	\$ 29
gene therapy (antisense, RNAi)	\$ -	\$ -	\$ 1	\$ 20
polymer (e.g., to absorb K+)	\$ -	\$ 1	\$ 0	\$ 0
allergen	\$ -	\$ 0	\$ 0	\$ 1

Top-Selling Drugs Reflect Changing Therapeutic Areas and Modalities

The top-selling products have changed substantially across decades, both in therapeutic area and molecule type.

2000: The top five products were all small molecules, led by gastrointestinal, cardiovascular, and CNS products.

2010: Immunology entered the top rankings, bringing biologics into the mix.

2020: Oncology and ophthalmology became more prominent among top sellers.

2030 forecast: Peptides and metabolic disease products are expected to rank near the top. Half-life extension and oral delivery technologies have enabled peptides to be attractive products.

Top 5 Drugs by Decade

2000	2010	2020	2030
Losec/Prilosec (AZ, GI)	Lipitor (Pfizer, CV)	Humira (Abbvie, immunol.)	Mounjaro (Lilly, metab.)
Lipitor (Pfizer, CV)	Plavix (BMS, CV)	Keytruda (Merck, oncol.)	Zepbound (Lilly, metab.)
Norvasc (Pfizer, CV)	Seretide/Advair (GSK, respir.)	Revlimid (BMS, oncol.)	Skyrizi (Abbvie, immunol.)
Prevacid (Takeda, GI)	Remicade (Centocor, immunol)	Eliquis (BSM, CV)	Dupixent (Sanofi, immunol.)
Celebrex (Pharmacia, CNS)	Humira (Abbott, immunol)	Eylea (Bayer, ophthal)	Keytruda (Merck, oncol.)

The Bar for Top-Selling Drugs Keeps Rising

In 2000, annual sales of \$2.8B were enough to make the top five. By 2030, the threshold is expected to rise to \$21B. In 2030, Lilly's tirzepatide is expected to be worth around \$60B.

Important context: Rankings are based on sales per product, not necessarily sales within a single therapeutic area.

Immunology and oncology products often behave like “pipelines in a product,” expanding across many indications over time.

Still, no product remains at the top forever. Even Humira, despite its well-known patent thicket, is expected to fall out of the top five. To replace LOE (Loss of Exclusivity) due to patent expirations of the current blockbusters, multiple billion-dollar products are likely required.

Top Pharma Companies Have Also Shifted Over Time

The same forces reshaping top-selling products—patent expirations, mergers, and changing growth therapeutic areas and modalities—have also reshaped the top 10 pharma companies by revenue.

Lilly and Novo are expected to benefit from the obesity market in 2030, with Novo entering the top 10 after being absent in prior decades.

The revenue threshold has also risen sharply: J&J made the 2000 list with about \$11B, while Pfizer is forecast to make the 2030 list with \$51B.

Interestingly, in 2000, the top 10 accounted for about 50-55% of pharmaceutical sales, but in 2030, the top 10 account for about 43% of global pharmaceutical sales. Biotech companies have outpaced pharma companies in innovation. From 1998 to 2016, biotechs produced 40% more FDA-approved “priority” drugs than the entire big pharma sector, despite biotech spending less than half as much on R&D in aggregate ([biotech-vs-big-pharma](#)).

Top Pharma Companies by Revenue

	2000	2010	2020	2030
1	GSK	Pfizer	J&J	Lilly
2	Pfizer	Novartis	Roche	Novo
3	Merck	Merck	Novartis	J&J
4	AstraZeneca	Aventis	Merck	Abbvie
5	Aventis	GSK	Abbvie	AstraZeneca
6	BMS	AstraZeneca	BMS	Roche
7	Novartis	J&J	Sanofi	Merck
8	Pharmacia	Abbott	Pfizer	Sanofi
9	Roche	Roche	GSK	Novartis
10	J&J	Lilly	AstraZeneca	Pfizer

Takeaways

The prescription drug market is not simply getting larger—it is constantly changing shape.

- Growth continues to be driven by **innovation**-driven products. **Biosimilars** are most common in high sales diseases.
- **Metabolic** diseases are becoming more central moving Lilly and Novo to the top of the pharma companies by revenue.
- **Newer modalities** such as antibodies, peptides, ADCs, and mRNA vaccines are gaining on small molecules, but small molecules are still dominant. Newer modalities can offer higher specificity and higher efficacy for subtypes of diseases defined by biomarkers. Half-life extension and oral delivery technologies have enabled newer modalities (including peptides) to be practical drugs.
- **Diagnostics and biomarkers** are drivers of increased sales with more patients treated earlier, turning acute disease management into chronic disease sales, without a change in underlying disease prevalence. Dividing a disease into multiple subtypes with biomarkers means **more drugs (and combinations)** can be successful, expanding the total market.
- **Scale matters** more than ever: the sales threshold for a top product continues to rise, and the companies best positioned for the next decade are those aligned with the highest-growth categories.

It will be fun to think about what the next untapped sales growth opportunity will be!