Diabetes care

Novo Nordisk
Diabetes care

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CMD22
CAPITAL MARKETS DAY
3 MARCH

SIMONE LENSBOLE
Simone lives with type 2 diabetes
Denmark
Forward-looking statements

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- Statements containing projections of or targets for revenues, costs, income (or loss), earnings per share, capital expenditures, dividends, capital structure, net financials and other financial measures,
- Statements regarding future economic performance, future actions and outcome of contingencies such as legal proceedings, and
- Statements regarding the assumptions underlying or relating to such statements.

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For an overview of some, but not all, of the risks that could adversely affect Novo Nordisk’s results or the accuracy of forward-looking statements in this Annual Report 2021, reference is made to the overview of risk factors in ‘Risk management’ of this Annual Report 2021.

Unless required by law, Novo Nordisk is under no duty and undertakes no obligation to update or revise any forward-looking statement after the distribution of this Annual Report 2021, whether as a result of new information, future events, or otherwise.

Important drug information

Victoza® and Ozempic® are approved for the management of type 2 diabetes only
Saxenda® and Wegovy® are approved in the USA and the EU for the treatment of obesity only
Strategic aspirations 2025

Purpose and sustainability (ESG)

- Progress towards zero environmental impact
- Being respected for adding value to society
- Being recognised as a sustainable employer

Commercial execution

- Strengthen Diabetes leadership - aim at global value market share of more than 1/3
- Strengthen Obesity leadership and double current sales¹
- Secure a sustained growth outlook for Rare disease

Innovation and therapeutic focus

- Further raise the innovation-bar for diabetes treatment
- Develop a leading portfolio of superior treatment solutions for obesity
- Strengthen and progress the Rare disease pipeline
- Establish presence in Other serious chronic diseases focusing on CVD, NASH and CKD

Financials

- Deliver solid sales and operating profit growth
  - Deliver 6-10% sales growth in IO
  - Transform 70% of sales in the US²
- Drive operational efficiencies across the value chain to enable investments in future growth assets
- Deliver free cash flow to enable attractive capital allocation to shareholders

¹ Based on reported sales in 2019. ² From 2015 to 2022, 70% of sales to come from products launched from 2015. IO: International Operations; CVD: Cardiovascular disease; NASH: Non-alcoholic steatohepatitis; CKD: Chronic kidney disease.

Note: The strategic aspirations are not a projection of Novo Nordisk’s financial outlook or expected growth.
Diabetes prevalence increases, yet only ~50% of people with diabetes are diagnosed and even fewer reach HbA$_{1c}$ target

In 2045, 784 million adults are expected to live with diabetes

Source: Diabetes prevalence and diagnosed are based on Diabetes Atlas 10th edition, 2021; Treated is based on IQVIA patient data; real-world studies indicate between 30-55% of patients reach HbA$_{1c}$ target <7% e.g. https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4388968/

Note: Region China is the Western Pacific number, i.e. also includes Australia which in NN's regions belongs to Rest of World
Better outcomes and broader reach can be accomplished through continued innovation, supported by digital solutions

Novo Nordisk’s product portfolio follows the patient treatment journey

**Portfolio and pipeline**

- **RYBELSUS®**
  - High dose oral semaglutide
- **OZEMPIC®**
  - Semaglutide 2.0 mg
- **TRESIBA®**
  - Icodec
- **Xultophy®**
  - IcoSema
- **RYZODEG®**
  - Fast-acting insulin aspart

**Digital health solutions**

- **NovoPen®6 / NovoPen Echo® Plus** are smart insulin pens and launched in 8 countries
- **Medtronic**
- **Abbott**
- **glooko**
- **Dexcom®**

**Partnered with global CGM players**

CGM: Continuous glucose monitoring; Grey boxes in the portfolio and pipeline references phase 2 or phase 3 assets.
GLP-1 and SGLT-2i have been driving the value growth of the global diabetes care market

**Estimated global number of patients**

- 2018: 192 million
- 2021: 218 million

**CAGR:** +4%

**Estimated global diabetes value market**

- 2018: USD 47 billion
- 2021: USD 55 billion

**CAGR:** +5%

**Diabetes market dynamics**

- Continued strong growth momentum in GLP-1 and SGLT-2i segments, but from a larger base
- DPP-4i segment to have first patent expiries on key products within the coming two years
- Flat insulin volume growth and continued insulin pricing pressure

**Note:** GLP-1 + basal insulin combination sales are included in insulin; Traditional OADs include metformin, SU and TZDs. CAGR: Compound annual growth rates. OAD: Oral anti-diabetes.

**Sources:** Patient data is Novo Nordisk estimates; Value data: 2018 and 2021 data based on company reported sales for insulin, GLP-1, SGLT-2i and DPP-4i and IQVIA data for traditional OADs as of December 2018 and 2021.
Use of GLP-1 treatments has increased globally, yet only ~6 million people treated

~6 million people, 3% of diabetes prescriptions, use a GLP-1 with large differences across markets

EMEA: Europe, Middle East and Africa; Region China covers Mainland China, Taiwan and Hong Kong
Source: IQVIA MAT, December 2021

Global: 3%
Novo Nordisk progresses towards strategic aspiration of reaching more than 1/3 of the diabetes value market

**Diabetes care sales**

<table>
<thead>
<tr>
<th>Year</th>
<th>Injectable GLP-1</th>
<th>Oral GLP-1</th>
<th>Insulin</th>
<th>Other Diabetes care</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>6%</td>
<td>4%</td>
<td>4%</td>
<td>8%</td>
<td>13%</td>
</tr>
<tr>
<td>2018</td>
<td>6%</td>
<td>4%</td>
<td>4%</td>
<td>8%</td>
<td>13%</td>
</tr>
<tr>
<td>2019</td>
<td>6%</td>
<td>4%</td>
<td>4%</td>
<td>8%</td>
<td>13%</td>
</tr>
<tr>
<td>2020</td>
<td>6%</td>
<td>4%</td>
<td>4%</td>
<td>8%</td>
<td>13%</td>
</tr>
<tr>
<td>2021</td>
<td>6%</td>
<td>4%</td>
<td>4%</td>
<td>8%</td>
<td>13%</td>
</tr>
</tbody>
</table>

**Progress made towards Strategic Aspiration**

- **Value market share**
  - NN diabetes MS: 27.5% in Dec 2017, 53.1% in Dec 2021
  - NN GLP-1 MS: 42.3% in Dec 2017, 44.0% in Dec 2021
  - NN insulin MS: 30.3% in Dec 2017

**Source:** Reported sales per year and sales growth at CER; IQVIA MAT, December 2021 (Spot rate)
Diabetes care sales in IO driven by both GLP-1 and insulin

Diabetes care sales and growth in IO

![Graph showing diabetes care sales and growth in IO]

Must-win battles for IO

<table>
<thead>
<tr>
<th>Drive insulin sales and patient base</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TRESIBA</strong>&lt;sup&gt;®&lt;/sup&gt;</td>
</tr>
<tr>
<td>Insulin (70% insulin-glucagon and 30% insulin aspart (DNA origin) injection)</td>
</tr>
<tr>
<td><strong>37.7%</strong></td>
</tr>
<tr>
<td>NN basal value market share</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Drive GLP-1 market growth</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OZEMPIC</strong>&lt;sup&gt;®&lt;/sup&gt;</td>
</tr>
<tr>
<td>Semaglutide injection</td>
</tr>
<tr>
<td><strong>59.4%</strong></td>
</tr>
<tr>
<td>NN GLP-1 value market share</td>
</tr>
</tbody>
</table>

IO: International Operations; CER: Constant exchange rates; NN: Novo Nordisk
Source: Reported sales and growth at CER; IQVIA MAT value December 2021
Region China remains a key strategic opportunity

**Region China is a large market with ~140 million people living with diabetes**

- 78% IO sales in Region China
- 77% IO sales in Rest of IO
- 22% IO patients in Region China
- 23% IO patients in Rest of IO

**Outcome of VBP insulin in China**
- Price cuts ~40-50% as a result of VBP
- Keeps ~50% of own brand volume in scope
- Resource re-allocation towards growth products

**Opportunities and strategic priorities**

**Large growing diabetes market**
- Market of 25 bDKK mainly consisting of OAD and insulin
- Diabetes market growth of ~7%

**Bring innovation faster to market**
- **Diabetes**: Rybelsus® and ONWARDS programme for Icodec
- **Rare disease**: Across portfolio

**Treat more patients**
- Expand patient base across new insulins and GLP-1s

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**Note:** IQVIA value in China only covers ~60% of the market
Region China includes Mainland China, Taiwan and Hong Kong; VBP: Volume-based procurement; OAD: Oral anti-diabetes; IO: International Operations
Source: IQVIA, MAT value December 2021
Despite uptake of GLP-1s, few patients are treated in International Operations

GLP-1 increases as part of the diabetes value market

**Ozempic® sales in IO in million DKK**

A fraction of diabetes prescriptions are GLP-1s (% of total diabetes market)

RoW: Rest of world; EMEA: Europe, Middle East and Africa; Region China includes Mainland China, Taiwan and Hong Kong; OAD: Oral anti-diabetes medicine; IO: International Operations; NAO: North America Operations

Source: IQVIA December 2021
Rybelsus® has only just started to be commercially available in IO with Japan being the biggest opportunity

**Rybelsus® is Novo Nordisk’s entry into 55% of the diabetes market**

<table>
<thead>
<tr>
<th>OAD</th>
<th>MOAD</th>
</tr>
</thead>
<tbody>
<tr>
<td>75%</td>
<td>25%</td>
</tr>
</tbody>
</table>

**IO diabetes market is DKK ~200 billion**

<table>
<thead>
<tr>
<th>Injectable</th>
<th>Oral</th>
</tr>
</thead>
<tbody>
<tr>
<td>45%</td>
<td>55%</td>
</tr>
</tbody>
</table>

**OAD: Oral anti-diabetes; MOAD: modern oral anti-diabetes market; IO: International Operations**

Source: IQVIA value spot rate December 2021, IQVIA LRx December 2021

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**Strong start for Rybelsus® in Japan’s DKK 20 billion MOAD market after 14-day prescription restriction was lifted**

![Graph showing TRx ('000) over months after launch](image)

- **Rybelsus®**
- ipragliflozin
- canagliflozin
- empagliflozin
- dapagliflozin

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1 Time for the 14-day prescription restriction lifted for the respective products. MOAD: Modern oral anti-diabetes market; IO: International Operations.

Source: IQVIA value spot rate December 2021, IQVIA LRx December 2021
Ozempic® and Rybelsus® are driving the diabetes care sales growth in North America Operations

Diabetes care sales and growth in North America Operations

- Transforming ~70% of US sales by 2022
  - Status: 60%

- Notably increasing the number of patients treated
  - Progress: Treating ~30% more patients since 2017

- Bringing two new blockbuster products to the market
  - Progress: Ozempic® is a 3x blockbuster and Rybelsus® is approaching blockbuster status just two years after launch

CER: Constant exchange rates
Note: Blockbuster products are products reaching USD 1 billion in sales
Ozempic® is driving growth in the GLP-1 class, which is still a small proportion of the US diabetes market

Diabetes volume¹ market share by segment

<table>
<thead>
<tr>
<th>Segment</th>
<th>GLP-1</th>
<th>SGLT-2i</th>
<th>DPP-4i</th>
<th>Insulin</th>
<th>OAD</th>
</tr>
</thead>
<tbody>
<tr>
<td>NBRx share</td>
<td>8%</td>
<td>8%</td>
<td>7%</td>
<td>29%</td>
<td>48%</td>
</tr>
<tr>
<td>OAD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: IQVIA, left hand side chart is IMS World data from Dec’21 and right hand sight chart is IQVIA data from the week ending 4 February 2022

¹Diabetes volume measured in prescriptions
NBRx: New to brand prescription; OAD: oral anti-diabetes medication

~30% GLP-1 volume market growth

~8% of diabetes prescriptions are GLP-1

32% of diabetes market value is GLP-1

US GLP-1 NBRx market share

Ozempic®³  63.1%
Rybelsus®  45.2%
dulaglutide 35.4%
Victoza®¹  11.9%
NN GLP-1    6.0%

~8% of diabetes market share by segment
Ozempic® launch has helped drive the changing treatment paradigm in the US

15% intensifies with non-generic treatment within 18 months of starting metformin

Ozempic® launch increases the use of GLP-1 as intensification after metformin

More than 60% of patients choose Novo Nordisk GLP-1 products

OAD: oral anti-diabetes medication;
Note: All numbers are from the North America Operations. The analysis is made by comparing patients starting metformin in Q1 2017 with patients starting metformin in Q4 2019 and has 300+ unique regimens grouped based on subclass hierarchy (GLP-1 reflects GLP-1 only, as well as regimens including any combination of subclasses), regimens hierarchy: insulin, GLP-1, SGLT2, DPP4, generic. Considering patients that started on Metformin (844K patients)
Source: IQVIA, MAT Dec'21
Rybelsus® is well-positioned in a competitive OAD market

US OAD market is ~100 bDKK

>90% of people starting on Rybelsus® are new to the GLP-1 class

Source of business for new to GLP-1

- Metformin/Naive: 49%
- SGLT-2i: 11%
- DPP-4i: 13%
- Other OADs: 19%
- Insulin: 8%

Rybelsus® is capturing new patients in the modern OAD market

TRx: Total prescriptions; OAD: oral anti-diabetes medication; MOAD: Modern oral antidiabetes medication
Source: Internal sales benchmark, CER; IQVIA, Xponent; IQVIA Nov'21-Feb'22 vs Aug'21-Nov'21 MOAD market growth

~3% MOAD volume market growth

Oct 2019

Feb 2022

4%
Raising the innovation-bar for diabetes treatment

Further raise the innovation bar for diabetes treatment

- Unmet need within diabetes remain large
- Moving towards patient outcomes beyond blood glucose lowering
- Developing differentiated next-generation injectable and oral GLP-1-based offerings
- Digital health to provide improved patient support and to achieve clinical trial results in the real world

Development pipeline

<table>
<thead>
<tr>
<th>Injectable incretins</th>
<th>2022</th>
<th>2023</th>
<th>2024</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Semaglutide 2.0 mg, QW GLP-1</td>
<td>US regulatory feedback pending</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CagriSema, FDC QW incretin treatment</td>
<td></td>
<td></td>
<td>Phase 2</td>
<td></td>
</tr>
<tr>
<td>Semaglutide+GIP, FDC QW incretin treatment</td>
<td></td>
<td></td>
<td>Phase 2</td>
<td></td>
</tr>
<tr>
<td>Semaglutide 1.0 mg in PAD</td>
<td></td>
<td>Phase 3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Semaglutide 1.0 mg in diabetic retinopathy</td>
<td></td>
<td></td>
<td>Phase 3</td>
<td></td>
</tr>
<tr>
<td>Semaglutide 1.0 mg in chronic kidney disease</td>
<td></td>
<td></td>
<td>Phase 3</td>
<td></td>
</tr>
<tr>
<td>Oral semaglutide 25 mg and 50 mg</td>
<td></td>
<td>Phase 3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SOUL, oral semaglutide 14 mg CVOT</td>
<td></td>
<td></td>
<td>Phase 3 (indicative, event-driven)</td>
<td></td>
</tr>
<tr>
<td>Icodec, QW basal insulin</td>
<td></td>
<td>Phase 3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IcoSema, QW FDC basal insulin and GLP-1</td>
<td></td>
<td></td>
<td>Phase 3</td>
<td></td>
</tr>
<tr>
<td>Ideal Pump Insulin (type 1 diabetes)</td>
<td></td>
<td></td>
<td>Phase 1</td>
<td></td>
</tr>
<tr>
<td>Glucose-sensitive insulin</td>
<td></td>
<td></td>
<td>Phase 1</td>
<td></td>
</tr>
<tr>
<td>DNA Immunotherapy (type 1 diabetes)</td>
<td></td>
<td></td>
<td>Phase 1</td>
<td></td>
</tr>
</tbody>
</table>

GIP: Gastric inhibitory polypeptide; FDC: Fixed-Dose Combination; QW: Once weekly; PAD: Peripheral arterial disease; CVOT: Cardiovascular outcome trial; cagri: Cagrilintide; sema: semaglutide; Ico: Icodec
Sema 2.0 mg showed superior HbA$_1^c$ reduction and additional weight reduction with similar number of GI AEs vs sema 1.0 mg

Semaglutide 2.0 mg showed a statistically significant HbA$_1^c$ reduction of 2.2% in SUSTAIN FORTE

### Additional efficacy and safety parameters

<table>
<thead>
<tr>
<th></th>
<th>Semaglutide 1.0 mg (n=481)</th>
<th>Semaglutide 2.0 mg (n=480)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Additional efficacy</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Body weight (kg)</td>
<td>-6.0</td>
<td>-6.9*</td>
</tr>
<tr>
<td>% of participants achieving HbA$_1^c$ &lt;7.0%</td>
<td>57.5</td>
<td>67.6</td>
</tr>
<tr>
<td>% of participants achieving HbA$_1^c$ &lt;6.5%</td>
<td>38.5</td>
<td>51.7</td>
</tr>
<tr>
<td><strong>Safety</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disc. due to AEs</td>
<td>4.6%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Nausea</td>
<td>14.6%</td>
<td>14.4%</td>
</tr>
<tr>
<td>Diarrhoea</td>
<td>8.8%</td>
<td>9.4%</td>
</tr>
<tr>
<td>Vomiting</td>
<td>6.7%</td>
<td>7.7%</td>
</tr>
</tbody>
</table>

Note: * Statistically significant; shown data is based on the trial product estimand. GI: Gastrointestinal; AE: Adverse events; Sema: semaglutide; Disc: discontinuation; EOT: End of trial
Insulin icodec, a basal insulin intended for once-weekly treatment, may reduce the disease burden for patients

**Bringing the strongest value proposition to market**

- **Reduction of disease burden** with once-weekly treatment
- **Tested for superior HbA1c and TiR** vs glargine and standard-of-care and similar safety profile of Tresiba®
- **App-based offering and connected smart pen** to optimise titration and support compliance and data collection
- **Reduced environmental footprint**

**Insulin icodec phase 3 programme expected to complete during 2022**

- **ONWARDS 1**
  - 970 people insulin-naïve, 78-week, vs insulin glargine U100

- **ONWARDS 2**
  - 520 people on basal, 26-week, vs insulin degludec

- **ONWARDS 3**
  - 580 people insulin-naïve, 26-week, vs insulin degludec

- **ONWARDS 4**
  - 580 people on both basal and bolus, 26-week, vs insulin degludec

- **ONWARDS 5**
  - 1,100 people, insulin-naïve using app-based dosing recommendations, 52-week

- **ONWARDS 6**
  - 580 people, type 1 diabetes using bolus insulin, 52-week, vs insulin degludec

**TiR: Time-in-range**
Exploring semaglutide to address the unmet needs of people with diabetes, beyond lowering blood glucose

**FLOW**
Chronic kidney disease outcomes trial
Semaglutide 1.0 mg, injectable
- ~3,500 patients with T2D, moderate to severe CKD
- Primary endpoint: Time to first occurrence of a composite primary outcome event²
- Estimated completion in 2024

**SOUL**
Cardiovascular outcomes trial
Semaglutide 14 mg, oral
- ~9,600 patients with T2D, established CVD or CKD
- Primary endpoint: Time to first major adverse cardiovascular event¹
- Estimated completion in 2024

**FOCUS**
Diabetic retinopathy outcomes trial
Semaglutide 1.0 mg, injectable + standard of care
- ~1,500 patients with T2D for 10 or more years
- Primary endpoint: Presence of ≥3 steps ETDRS patient level progression
- Estimated completion in 2027

**STRIDE**
Peripheral arterial disease
Semaglutide 1.0 mg, injectable
- ~800 patients with type 2 diabetes and PAD
- Primary endpoint: Change in maximum walking distance
- Estimated completion in 2024

¹Major adverse cardiovascular event defined as CV death, non-fatal stroke or non-fatal myocardial infarction; ²Defined as persistent eGFR decline of ≥50% from trial start, reaching end stage renal disease, death from kidney disease or death from cardiovascular disease

T2D: Type 2 diabetes; CVD: Cardiovascular disease; PAD: Peripheral arteries disease; ETDRS: Early treatment diabetic retinopathy study; CKD: Chronic kidney disease
Fixed dose combination with semaglutide and cagrilintide currently investigated in phase 2 with completion in 2022

Phase 2 trial design for CagriSema

- **Randomisation (1:1:1)**
  - Cagrilintide OW + semaglutide OW
  - Cagrilintide OW + placebo OW
  - Semaglutide OW + placebo OW

- **Dose escalation** 16 weeks
- **Treatment maintenance** 16 weeks
- **FU 5 weeks**

**Trial objective**: Compare the effect on glycaemic control and body weight of cagrilintide in combination with semaglutide vs semaglutide in patients with type 2 diabetes

**Primary endpoint**: Change in HbA1c (%-point)

**Next steps**: 37-week trial was initiated in Q3 2021

Role of amylin analogues in diabetes treatment

**Amylin** is a naturally occurring hormone.

When administered it lowers blood glucose in four ways

- Slow gastric emptying, preventing blood sugar rising too fast
- Lowers the glucose production in the liver
- Increases satiety
- Lowering of glucagon in connection with meals

**Next steps**

Ongoing phase 2 trials for CagriSema and semaglutide in combination with GIP is expected to complete during second half of 2022
Closing remarks

Number of people with diabetes continues to increase

GLP-1 treatments are driving the growth of the diabetes care market, yet only 3% of prescriptions

Insulin icodex has the potential to reduce the disease burden and improve outcome

Novo Nordisk is progressing towards achieving more than a 1/3 of the diabetes value market