

# Launch Landscape Monthly Launch Tracker

*March 2024 Edition*

Launches through March 2024

Weekly NBRx data through week ending April 5, 2024

Monthly Sales data through March 2024

Issued by Launch COE on May 1<sup>st</sup>, 2024

# The IQVIA Launch Center of Excellence (LCoE)



## Our mission:

The U.S. Launch Center of Excellence at IQVIA aims to partner with our clients through the entire launch process to achieve sustainable commercial success. Through in-depth research in all facets of Launch, the LCoE provides a best-in-industry perspective on the evolving launch environment.



**Brian Lasky**  
*U.S. Lead, LCoE*

Brian's career spans 25+ years in pharmaceutical sales, consulting and analytics. He has expertise in commercialization, launch dynamics, and deep therapy area expertise in markets like HIV, diabetes/obesity and MASH



**Ester Oben Etah, PhD**  
*Senior Principal, LCoE*

Dr. Oben Etah has extensive experience in quantitative market analytics, forecasting, patient-level data, and industry analysis in Europe and the U.S.



**Nadine Vangelov**  
*Senior Principal, LCoE*

With over 22 years of industry experience in the U.S. and Canada, Nadine specializes in advising companies on launch strategies and tactics based on market archetypes



**Nora Hannigan**  
*Associate Director, Brand Performance & Launch Solutions*

With over 20 years at IQVIA, Nora has a deep knowledge of the IQVIA data assets, offering development, and thought leadership. She is an expert in launch performance assessment framework



**Michael MacArthur**  
*Engagement Manager, LCoE*

With over 18 years of experience in pharmaceutical finance and human data science, Michael specializes in competitive analysis, forecasting, and leveraging big data to inform strategic decision-making



**Robert Unger**  
*Engagement Manager, LCoE*

Rob has a background in mechanical engineering, and over 20 years of experience in the pharmaceutical industry. He specializes in custom APLD and forecasting studies



**Peter Zavitsanos**  
*Senior Consultant, LCoE*

Peter has over a decade of experience working in public health and healthcare data, and is responsible for publishing the Launch Landscape report each month



**Elyse Muñoz, PhD**  
*Director, U.S. Research & Insights*

Elyse leads a team of researchers focused on developing evidence-based perspectives on emerging healthcare trends and the strategies needed to improve outcomes for stakeholders across the system

# Launch Landscape as of March 2024

There have been 7 new launches through March 2024;  
Infectious disease is the top therapy area in 2024, accounting for 29% of new product launches

**7** new launches through March 2024



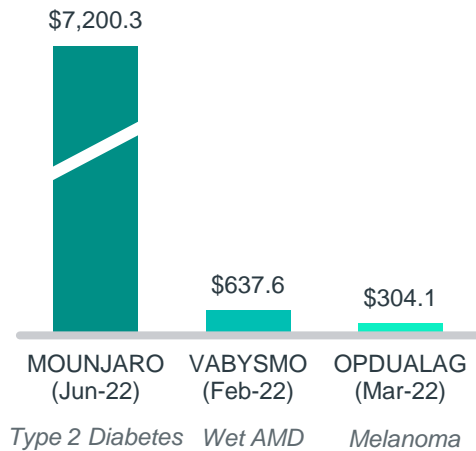
**11** FDA Approved New Molecular Entities (NMEs)

There were **54** NMEs in 2023 and **36** NMEs in 2022

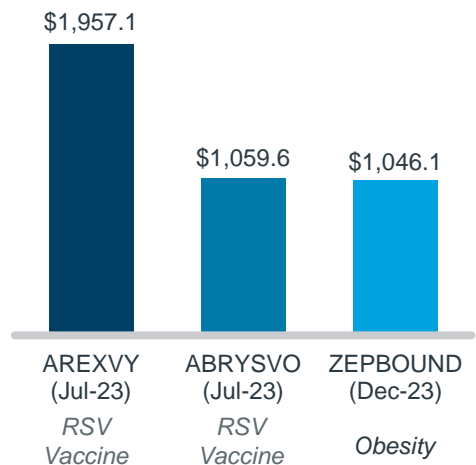
## Top therapy areas (share of launches)

<b>2024</b> n=7	<b>Anti-Infectives</b> 29%	<b>Blood</b> 14%	<b>Dermatology</b> 14%
<b>2023</b> n=84	<b>Immunology</b> 30%	<b>Oncology</b> 13%	<b>Anti-Infectives</b> 11%
<b>2022</b> n=57	<b>Oncology</b> 19%	<b>CNS</b> 17%	<b>Anti-Infectives</b> 15%

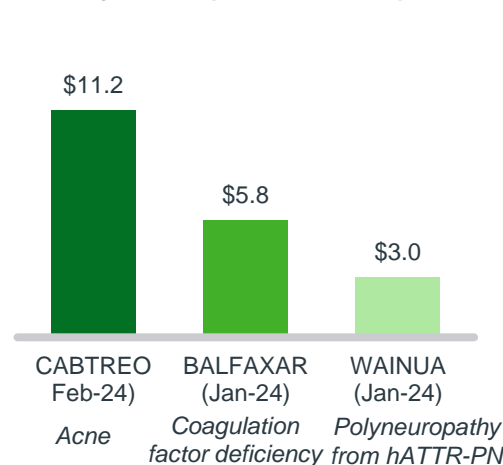
Top 2022 launches by sales (USD millions)



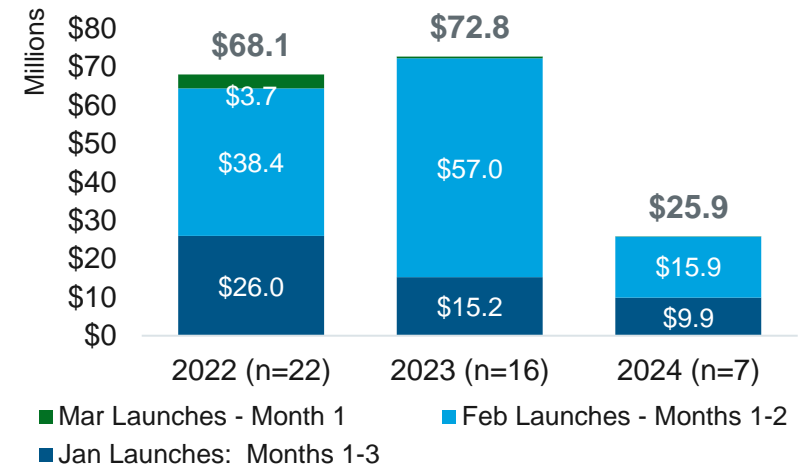
Top 2023\* launches by sales (USD millions)



Top 2024\* launches by sales (USD millions)



Monthly Sales (through March)



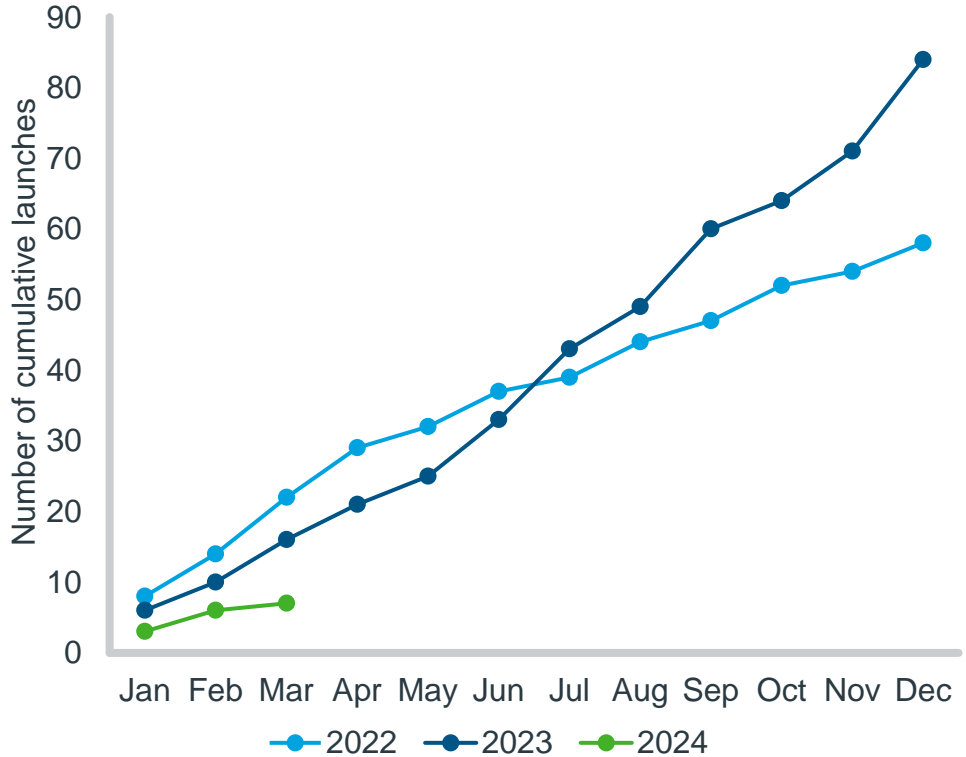
\*First year sales from launch month through March 2024 \*\*Evidence of launch activity is classified by the product having supply in SMART channels OR an active website

Notes: All sales values are USD. AMD = age-related macular degeneration; CNS = Central nervous system; NME = new molecular entity  
IQVIA U.S. Launch Landscape Tracker, March 2024

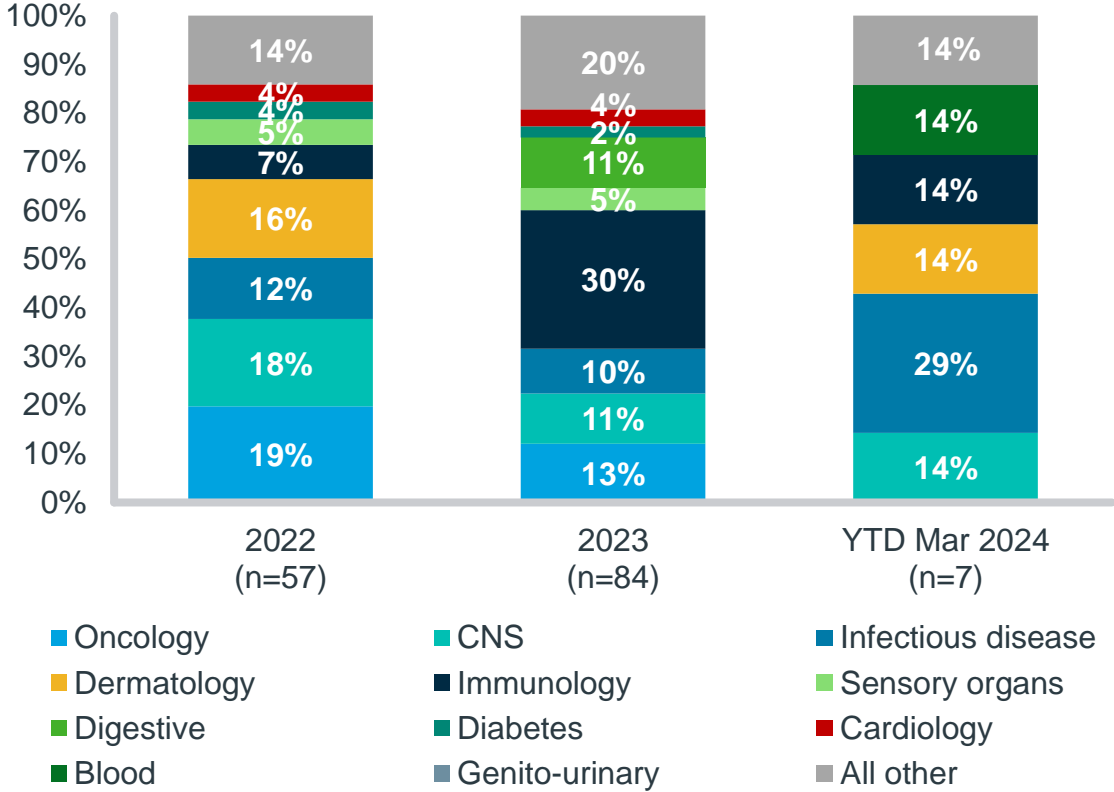
# There are 7 new launches through March 2024, which is down from prior years

2023 closed with 84 total launches after a mid-year increase, surpassing the 57 launches in 2022

Time-aligned cumulative launches  
2022–Mar 2024



Share of launches by therapy area  
2022–Mar 2024

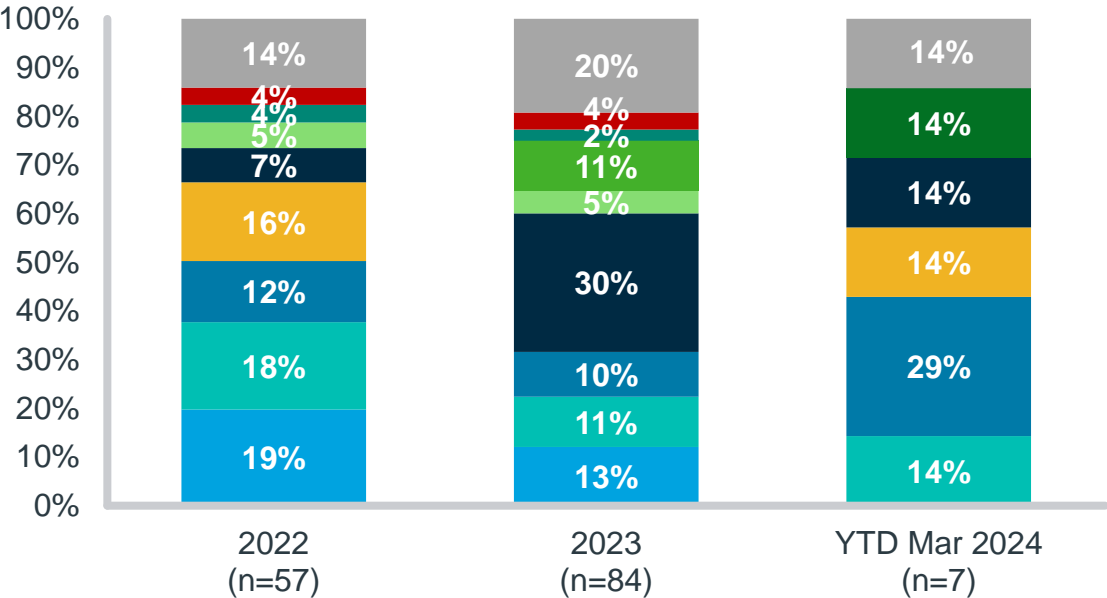


Source: National Sales Perspective; Launch Center of Excellence, IQVIA; publicly available information from the FDA  
Notes: CNS = Central nervous system

# Therapy area mix remains similar, but sales shares are driven by transformative therapies like Mounjaro in 2022 and Arexvy in 2023

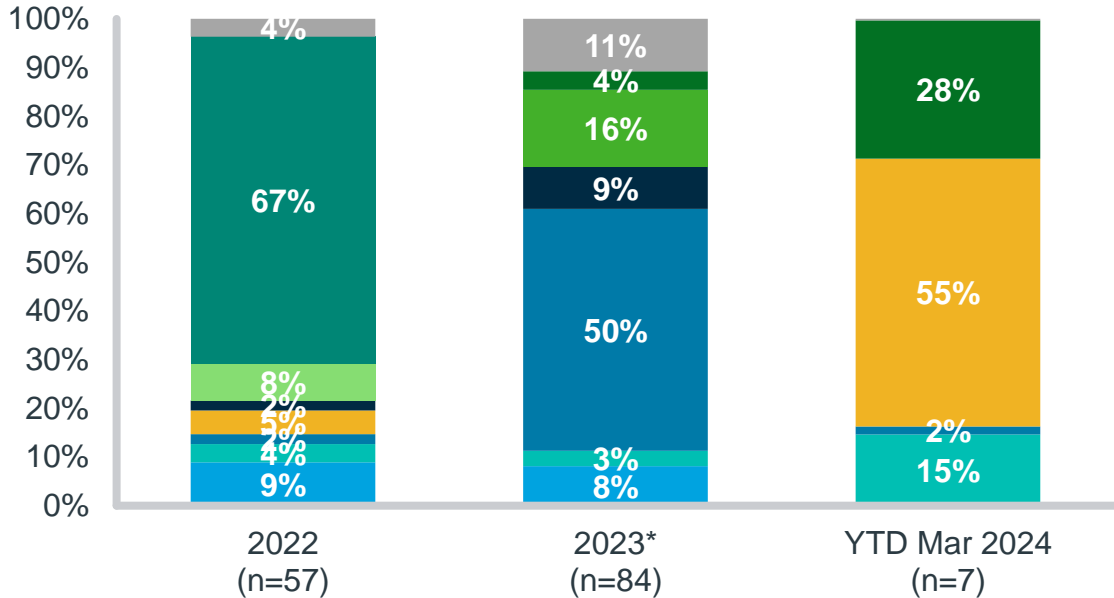
*Bausch Health's acne topical, Cabtreo, accounts for 55% of 2024 sales*

Share of launches by therapy area  
2022–Mar 2024



- Oncology
- Dermatology
- Digestive
- Blood
- CNS
- Immunology
- Sensory organs
- Diabetes
- Cardiology
- Genito-urinary
- All other

Share of sales by therapy area  
2022–Mar 2024

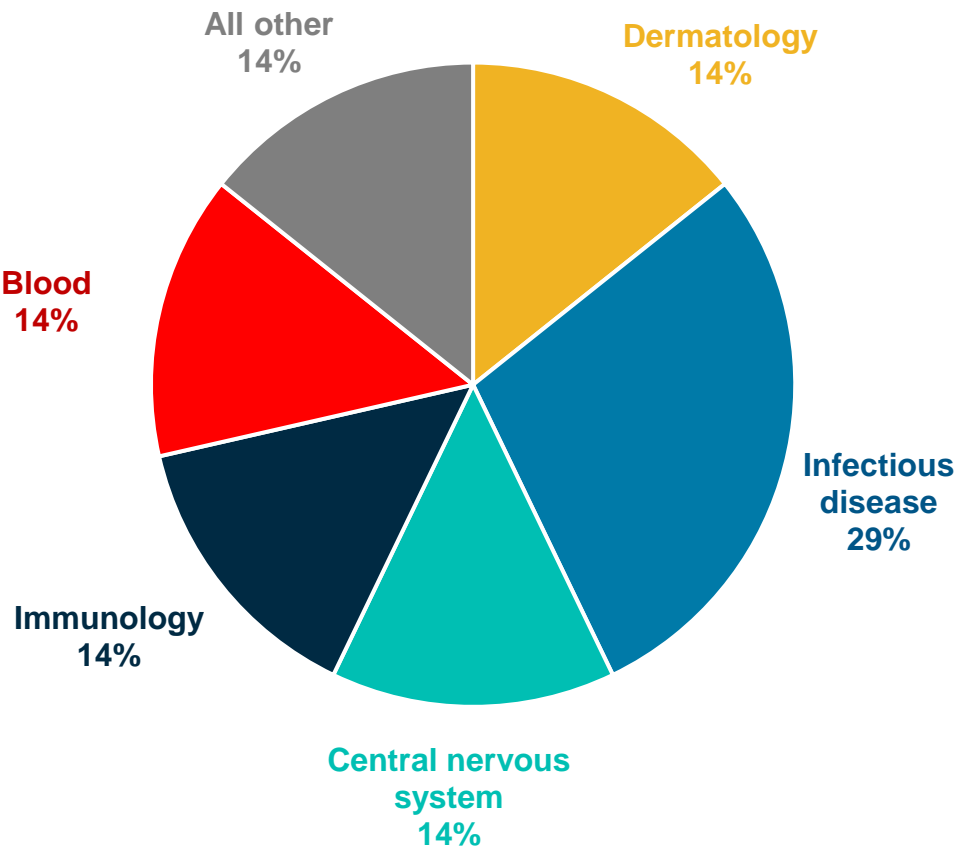


- Oncology
- Dermatology
- Digestive
- Blood
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- Immunology
- Sensory organs
- Diabetes
- Cardiology
- Genito-urinary
- All other

Source: National Sales Perspective; Launch Center of Excellence, IQVIA; publicly available information from the FDA  
 Notes: CNS = Central nervous system; RSV = Respiratory Syncytial Virus  
 IQVIA U.S. Launch Landscape Tracker, March 2024

# Bausch Health's Cabtreo (clindamycin/adapalene/benzoyl peroxide), topical for acne, leads the 2024 launches

2024 – 7 Launches



2024 – Top Performers

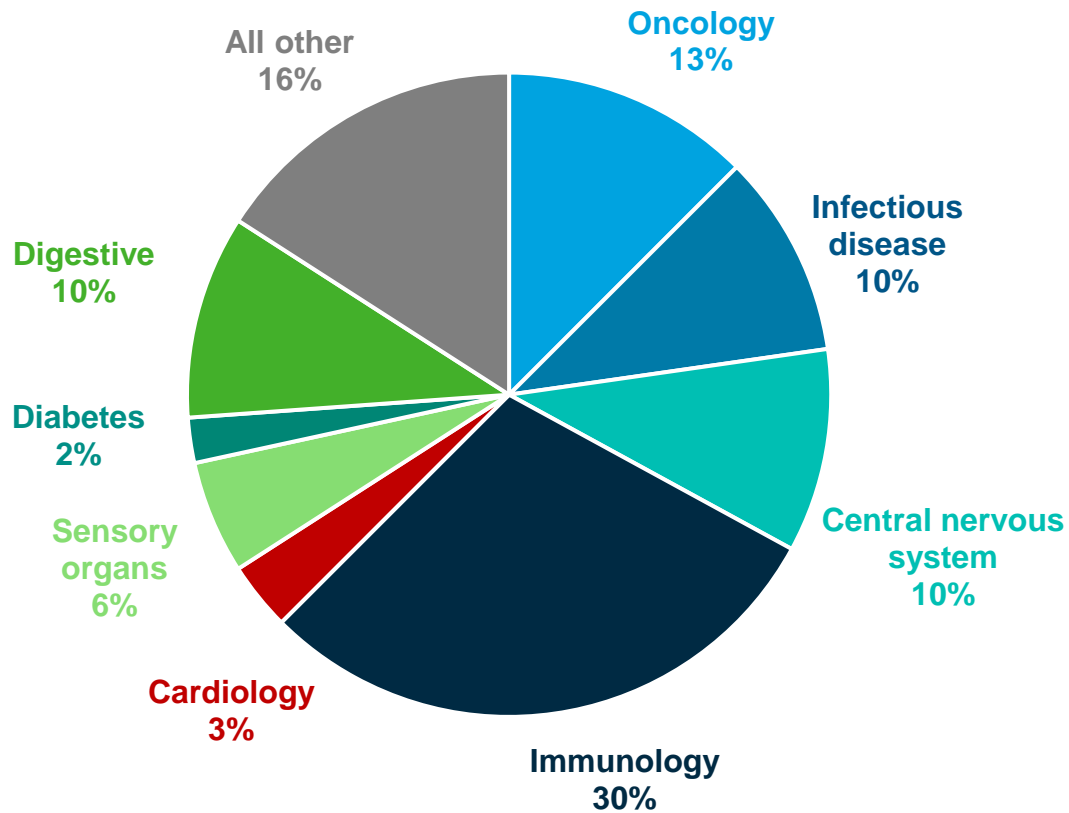
Product	Company	Indication	Launch date	First year gross sales (as of Mar-24)
<b>Cabtreo</b> <i>clindamycin phosphate, adapalene &amp; benzoyl peroxide</i>	Bausch Health	Acne	Feb-24	\$11.2M
<b>Balfaxar</b> <i>prothrombin complex concentrate, human-lans</i>	Octapharma	Urgent reversal of acquired blood coagulation factor deficiency induced by warfarin therapy	Jan-24	\$5.8M
<b>Wainua</b> <i>eplontersen</i>	AstraZeneca	Polyneuropathy caused by hereditary transthyretin amyloidosis (hATTR-PN)	Jan-24	\$2.9M
<b>Ixchiq</b> <i>Chikungunya disease vaccine</i>	Valneva	Chikungunya disease	Feb-24	\$263K
<b>Penbraya</b> <i>Meningococcal meningitis vaccine</i>	Sanofi	Meningococcal meningitis	Jan-24	\$69K
<b>Zymfentra</b> <i>Antihemophilic factor recombinant</i>	Celltrion	Maintenance treatment of UC following IV infliximab	Mar-24	\$56K
<b>Daxxify</b> <i>daxibotulinumtoxinA-lanm</i>	Stemline	Temporary improvement in appearance of moderate-to-severe glabellar lines	Feb-24	\$8K

Source: National Sales Perspective; Launch Center of Excellence, IQVIA  
 Notes: All sales values are USD. hATTR-PN = hereditary transthyretin amyloidosis

# 2023 sales have been dominated by GSK's RSV vaccine, Arexvy

Lilly's Zepbound for obesity is having a strong launch, surpassing \$1 billion in sales within four months

2023 – 84 Launches



2023 – Top 10 Performers

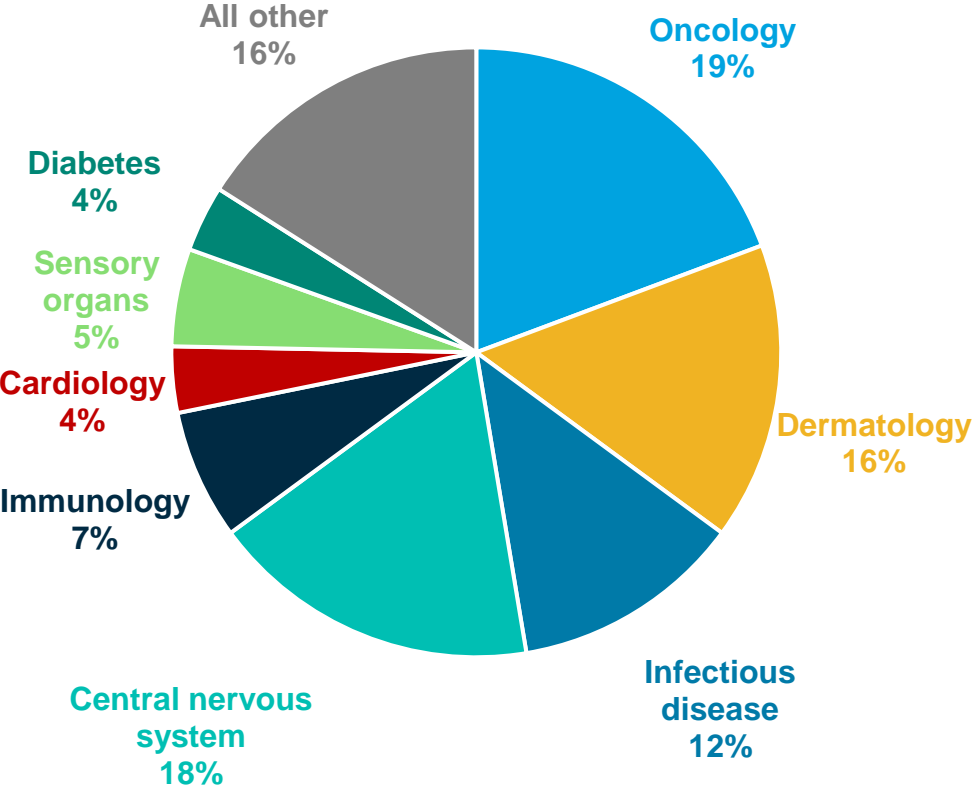
Product	Company	Indication	Launch date	First year gross sales (as of Mar-24)
<b>Arexvy</b> <i>RSV vaccine</i>	GSK	Prevention of LRTD caused by RSV (60+ y/o)	Jul-23	\$1.96B
<b>Abrysvo</b> <i>RSV vaccine</i>	Pfizer	RSV vaccine (gest. age 32-36wks, 60+ y/o)	Jul-23	\$1.06B
<b>Zepbound</b> <i>tirzepatide</i>	Lilly	Obesity	Dec-23	\$1.05B
<b>Altuviio</b> <i>Antihemophilic factor recombinant</i>	Sanofi	Hemophilia A	Apr-23	\$263.9M
<b>Beyfortus</b> <i>nirsevimab</i>	Sanofi	RSV vaccine Pediatrics 0-24m	Sep-23	\$248.0M
<b>Miebo</b> <i>perfluorohexyloctane ophthalmic solution</i>	Bausch + Lomb	Dry eye disease	Sep-23	\$162.6M
<b>Elahere</b> <i>mirvetuximab soravtansine</i>	Immunogen	Ovarian, fallopian tube and peritoneal cancer	Mar-23	\$160.9M
<b>Orserdu</b> <i>elacestrant</i>	Stemline	ER+ / HER2- breast cancer	Feb-23	\$158.4M
<b>Amjevita</b> <i>adalimumab</i>	Amgen	CD, PsA, PsO, RA, UC	Feb-23	\$118.4M
<b>Jaypirca</b> <i>pirtobrutinib</i>	Eli Lilly	Mantle cell lymphoma	Feb-23	\$82.5M

Source: National Sales Perspective; Launch Center of Excellence, IQVIA

Notes: All sales values are USD. CD = Crohn's disease; LRTD = lower respiratory tract disease; PsA = psoriatic arthritis; PsO = plaque psoriasis; RA = rheumatoid arthritis; UC = ulcerative colitis; y/o = years old

# Lilly's Mounjaro is the best-selling launch product of 2022, followed by Genentech's Vabysmo for wet macular degeneration

2022 – 57 Launches



2022 – Top 10 Performers

Product	Company	Indication	Launch date	First year gross sales
<b>Mounjaro</b> <i>tirzepatide</i>	Eli Lilly	Type 2 diabetes	Jun-22	\$7.2B
<b>Vabysmo</b> <i>faricimab</i>	Genentech	Wet macular degeneration	Feb-22	\$632.4M
<b>Opdualag</b> <i>nivolumab/relatlimab</i>	BMS	Metastatic melanoma	Mar-22	\$304.1M
<b>Radicava</b> <i>edaravone</i>	Mitsubishi Tanabe	Amyotrophic lateral sclerosis	Jun-22	\$165.9M
<b>Bebtelovimab</b> <i>monoclonal antibody</i>	Eli Lilly	COVID-19	Aug-22	\$156.9M
<b>Tezspire</b> <i>tezepelumab</i>	Amgen	Severe asthma	Jan-22	\$156.2M
<b>Vyvgart</b> <i>efgartigimod alfa</i>	Argenx	Generalized myasthenia gravis	Jan-22	\$151.6M
<b>Adbry</b> <i>tralokinumab</i>	Leo Pharma	Atopic dermatitis	Feb-22	\$145.3M
<b>Kimmtrak</b> <i>tebentafusp</i>	Immunocore	Uveal melanoma	Feb-22	\$101.3M
<b>Leqvio</b> <i>inclisiran</i>	Novartis	Atherosclerosis	Jan-22	\$59.1M

Source: National Sales Perspective; Launch Center of Excellence, IQVIA  
Notes: All sales values are USD.

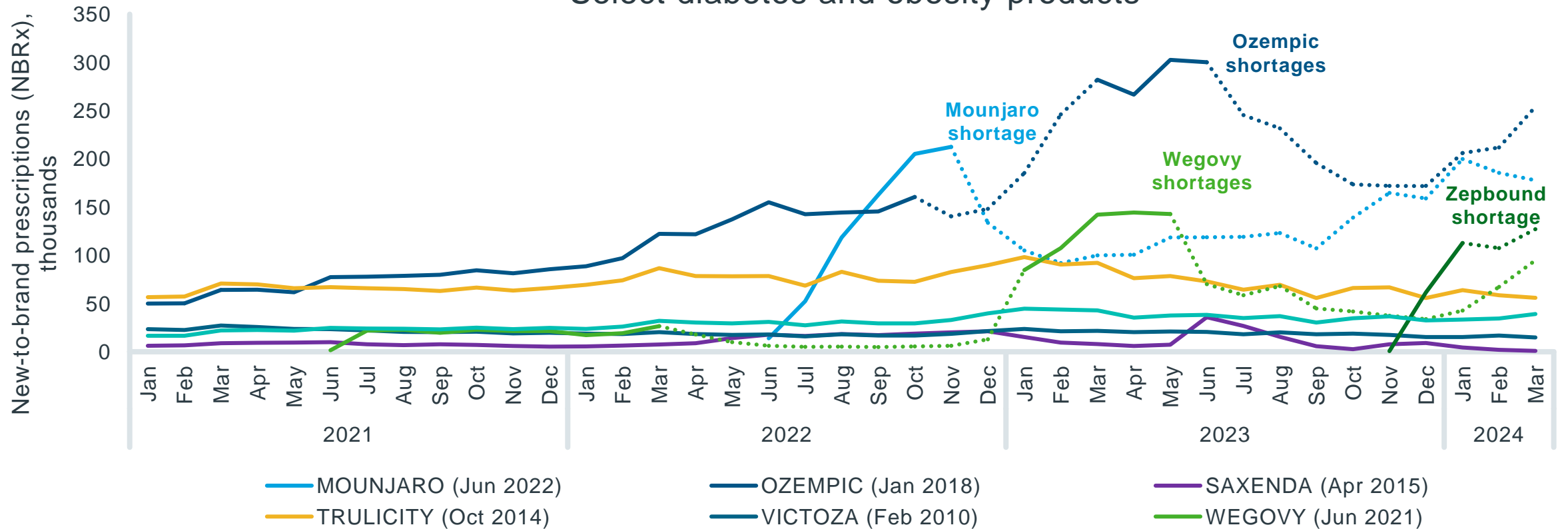


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# Despite ongoing shortages, the GLP-1 market continues to grow

*With ~95k new-to-brand prescriptions in March 2024, Wegovy had its best month since May 2023*

Monthly new-to-brand (NBRx) volumes,  
Select diabetes and obesity products

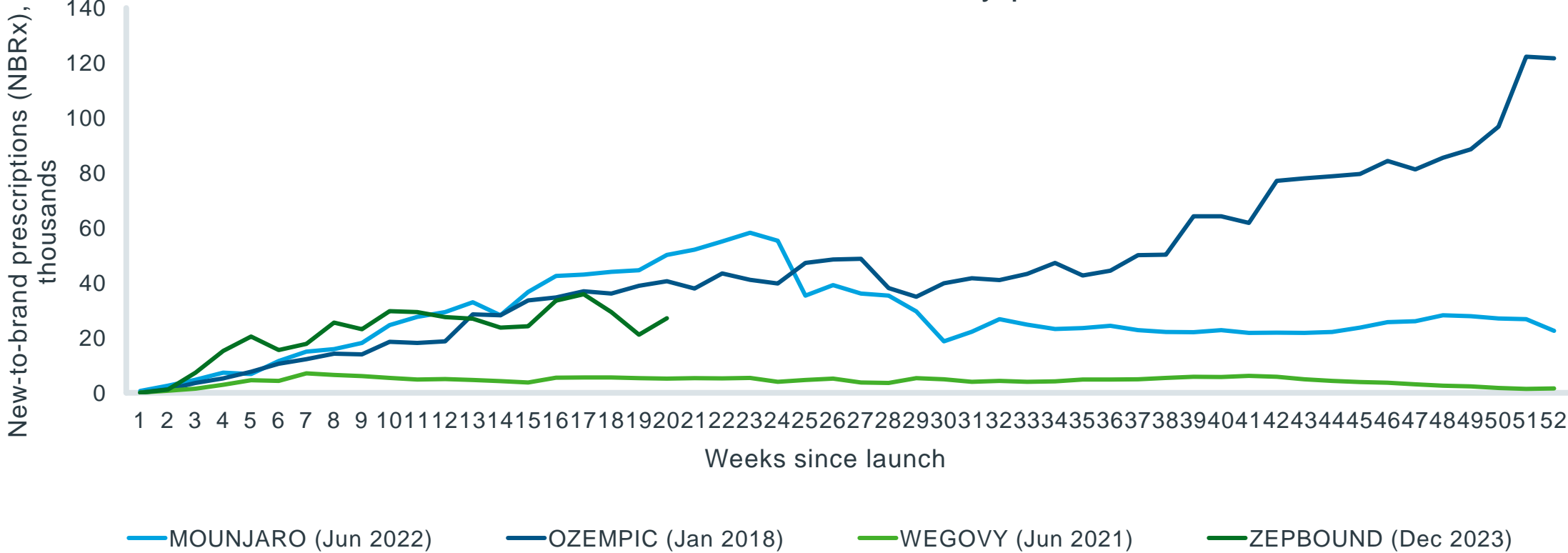


Source: National Sales Perspective, National Prescription Audit, Patient Insights; Launch Center of Excellence, IQVIA

# Weekly NBRx of Lilly's Zepbound have recently dampened due to shortage, but remain competitive

*Built off the market demand for effective obesity treatments, Zepbound's uptake curve exceeds Wegovy's performance*

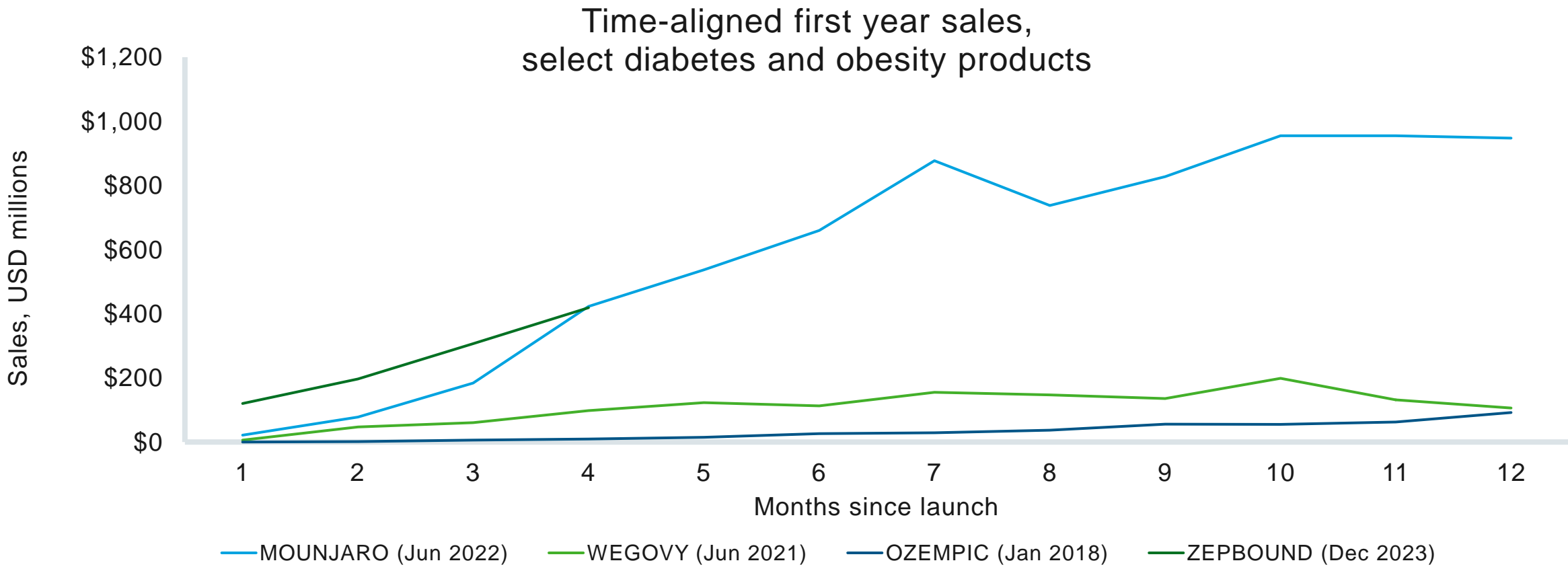
Weekly time-aligned new-to-brand (NBRx) volumes, Select diabetes and obesity products



Source: National Sales Perspective, National Prescription Audit, Patient Insights; Launch Center of Excellence, IQVIA

# From a sales perspective, Lilly's Zepbound is outperforming previous GLP-1 launches throughout its first year

*Despite shortages, Mounjaro and Zepbound sales exceed Ozempic and Wegovy during the same launch timeframe*



Source: IQVIA SMART, Launch Edition, National Sales Perspective; Launch Center of Excellence, IQVIA

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# Market Spotlight: Humira Biosimilars

# Humira biosimilar snapshot

Product	Company	Approval Date	Launch Date	Time from Approval to Launch	Y1 Sales (Mar 2024)	Y1 Promo (Mar 2024)
Amjevita (adalimumab-atto)	Amgen	Sep-16	<b>Jan-23</b> Launched with 2 pricing options: Low WAC: (\$3,115) 55% discount High WAC: (\$6,576) 5% discount Interchangeability designation P3 study is ongoing	6y 4mo	\$ 118.4M	\$ 39.5M
<b>Cyltezo (adalimumab-adbm)</b>	Boehringer Ingelheim	Aug-17 (original approval); Oct 2021 (interchangeable)	<b>Jul-23</b> Launched at 5% discount Now available at low WAC (will be priced <a href="#">at 81% discount</a> )	6 years	\$ 15.0M	\$ 101.5M
<b>Hyrimoz (adalimumab-adaz)</b>	Sandoz	Oct-18	<b>Jul-23</b> Launched at 5% discount	4y 9mo	\$19.4M	\$ 7.4M
Hadlima (adalimumab-bwwd)	Samsung Bioepis and Organon	Jul-19; <i>FDA accepted sBLA for interchangeability</i>	<b>Jul-23</b> launched at 85% discount; top-line results from interchangeability trial announced in Aug 2023	4 years	\$ 24.7M	\$ 3.2M
<b>Abrilada (adalimumab-afzb)</b>	Pfizer	Nov-19 (original approval) Oct-23 (interchangeable approval)	<b>Oct-23</b> Initially available at WAC of <a href="#">5% discount</a> of Humira list price, now available at a list price 60% below Humira	4 years	\$ 31.9k	\$ 21.6k
Hulio (adalimumab-fkjp)	Mylan/Fujifilm Kyowa Kirin Biologics	Jul-20	<b>Jul-23</b> Launched at (WAC: \$6,576) 5% discount	3 years	\$ 492k	\$ 360k
Yusimry (adalimumab-aqvh)	Coherus Biosciences	Dec-21	<b>Jul-23</b> Launched at (WAC: \$995) 86% discount	1y 7mo	\$ 6.5M	\$ 162k
Idacio (adalimumab-aacf)	Fresenius Kabi USA	Dec-22	<b>Jul-23</b> Launched at (WAC: \$6,576) 5% discount	7 months	\$ 6.3M	\$ 404k
Yuflyma (adalimumab-aaty)	Celltrion	May-23; <i>Filed IND to demonstrate interchangeability</i>	<b>Jul-23</b> Launched at (WAC: \$6,576) 5% discount	2 months	\$ 4.1M	\$ 1.5M
<b>Simlandi (adalimumab-ryvk)</b>	Teva/Alvotech	Feb-24 (approved with interchangeability)	<b>Anticipated Q2 2024</b> First high-concentration, citrate-free biosimilar to Humira Partnership with Quallent announced	N/A	N/A	N/A

\*indicates interchangeability with reference product

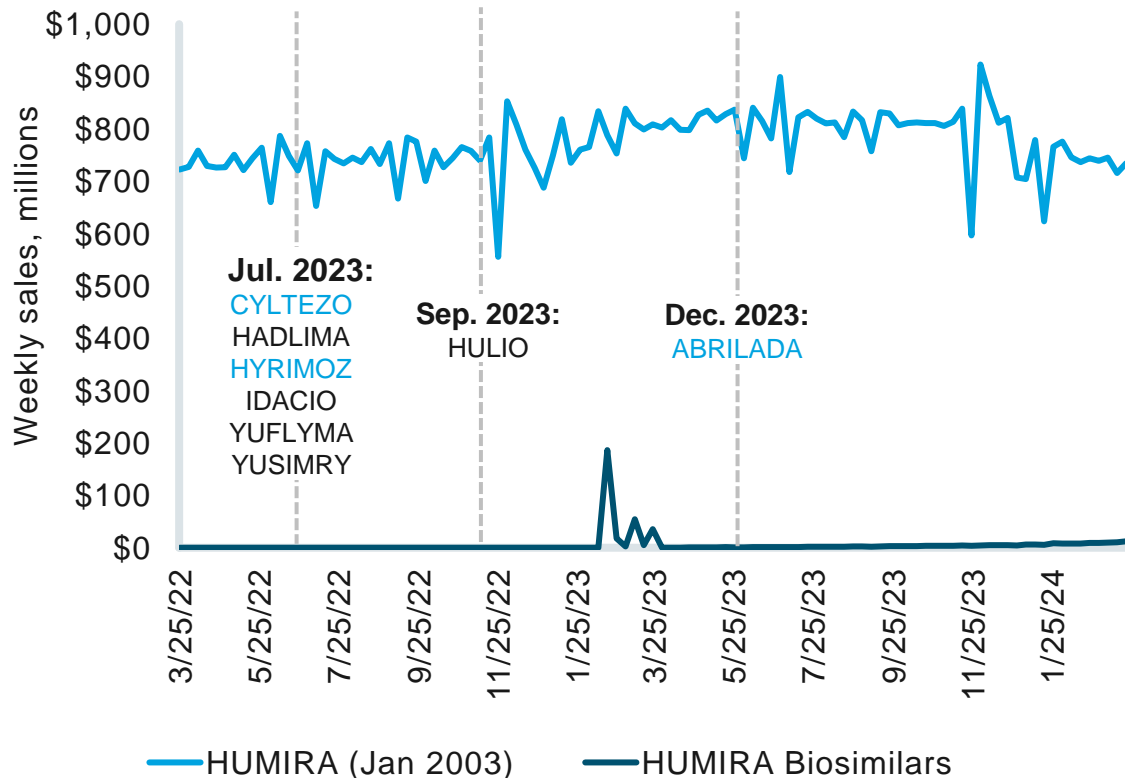
Source: National Sales Perspective; Launch Center of Excellence, IQVIA

Notes: All sales values are USD. WAC = wholesale acquisition cost

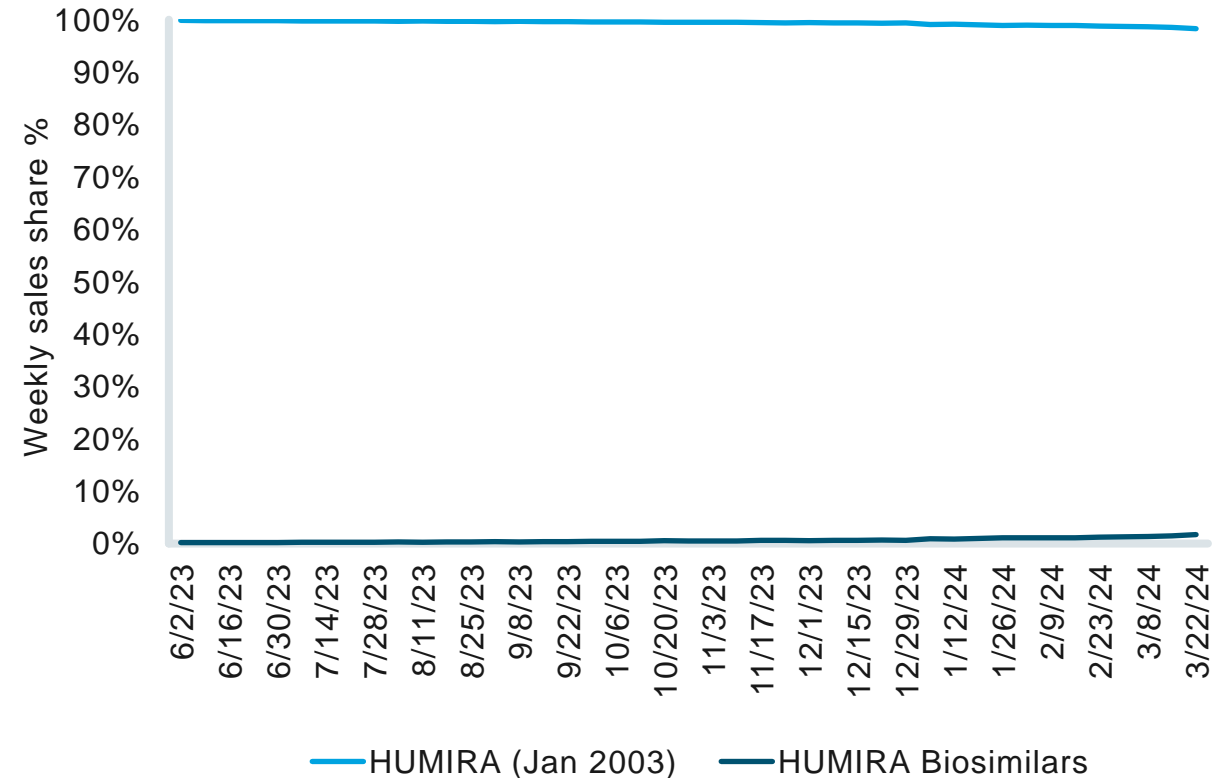
# Humira has held position despite biosimilar entrants, however recent PBM reprioritization is expected to intensify competition

*As of April 1, 2024, CVS Caremark removed Humira from its national commercial formularies*

**Weekly sales, Humira and Humira biosimilars  
June 2023 – March 2024**



**Weekly sales share, Humira and Humira biosimilars  
June 2023 – March 2024**



\*indicates interchangeability with reference product

Source: National Sales Perspective; Launch Center of Excellence, IQVIA

Notes: All sales values are USD. PBM = pharmacy benefit manager