

Launch Landscape Monthly Launch Tracker

May 2024 Edition

Launches through May 2024

Weekly NBRx data through week ending May 31st, 2024

Monthly Sales data through May 2024

Issued by The IQVIA Launch Center of Excellence (LCoE) on July 12th, 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 May 2024

There have been 19 new launches through May 2024; Immunology is the top therapy area in 2024, accounting for 21% of new product launches

19 new launches through May 2024



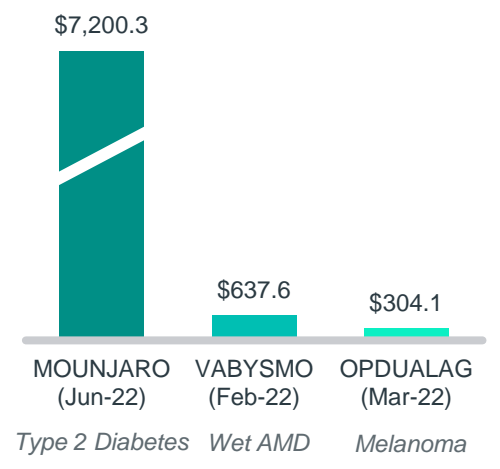
16 FDA Approved New Molecular Entities (NMEs) in 2024

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

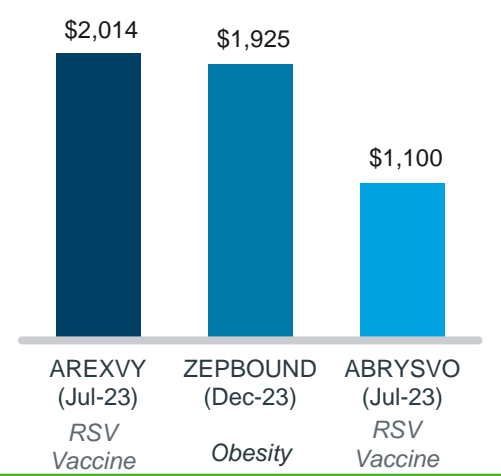
Top therapy areas (share of launches)

2024 n=19	Immunology 21%	Anti-Infectives 21%	Digestive 16%
2023 n=84	Immunology 27%	Oncology 13%	Digestive 11%
2022 n=57	Oncology 19%	CNS 18%	Anti-Infectives 15%

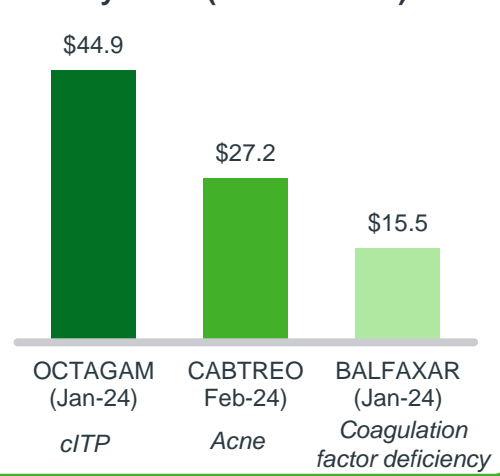
Top 2022 launches by sales (USD millions)



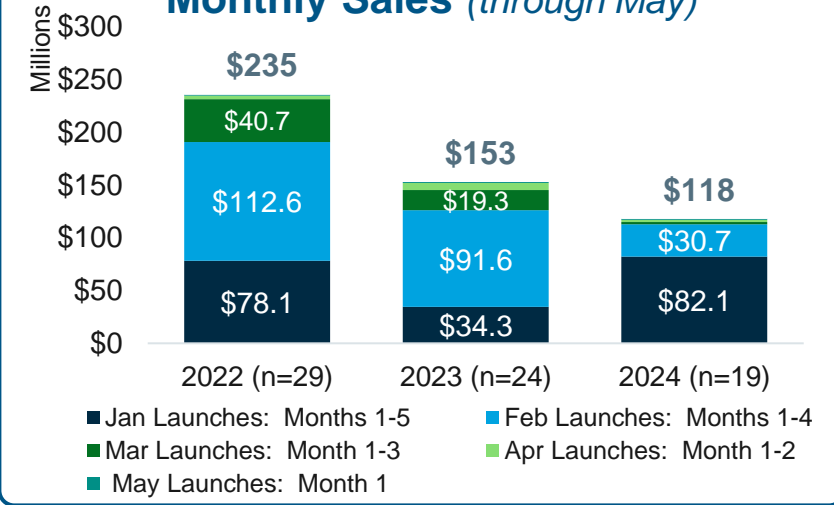
Top 2023* launches by sales (USD millions)



Top 2024* launches by sales (USD millions)



Monthly Sales (through May)



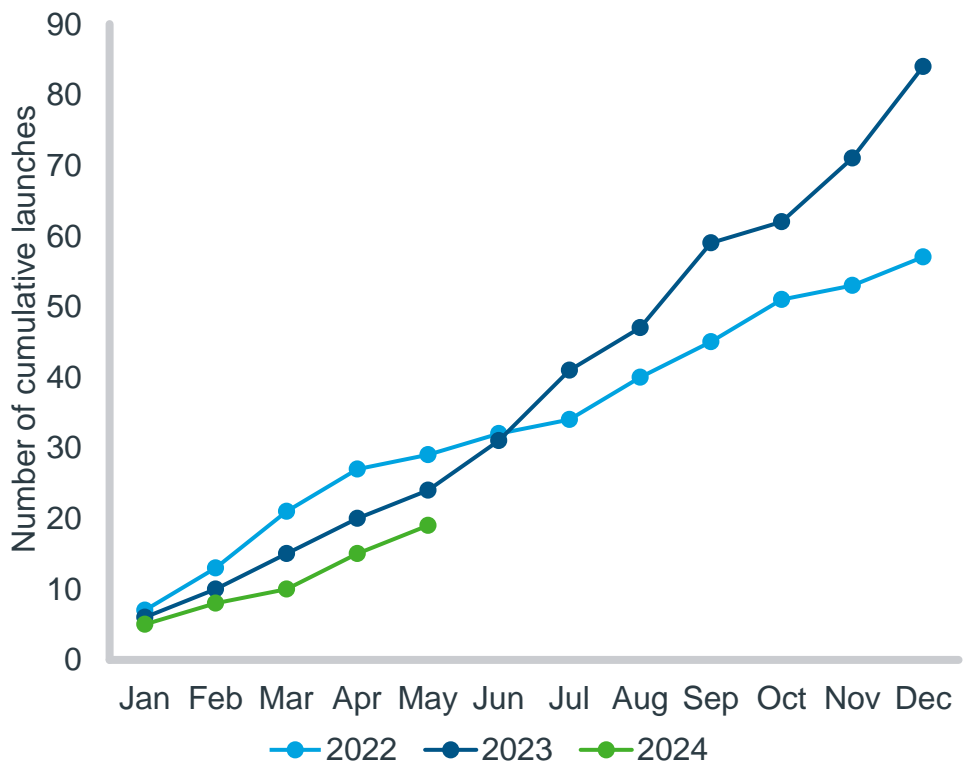
*First year sales from launch month through May 2024

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

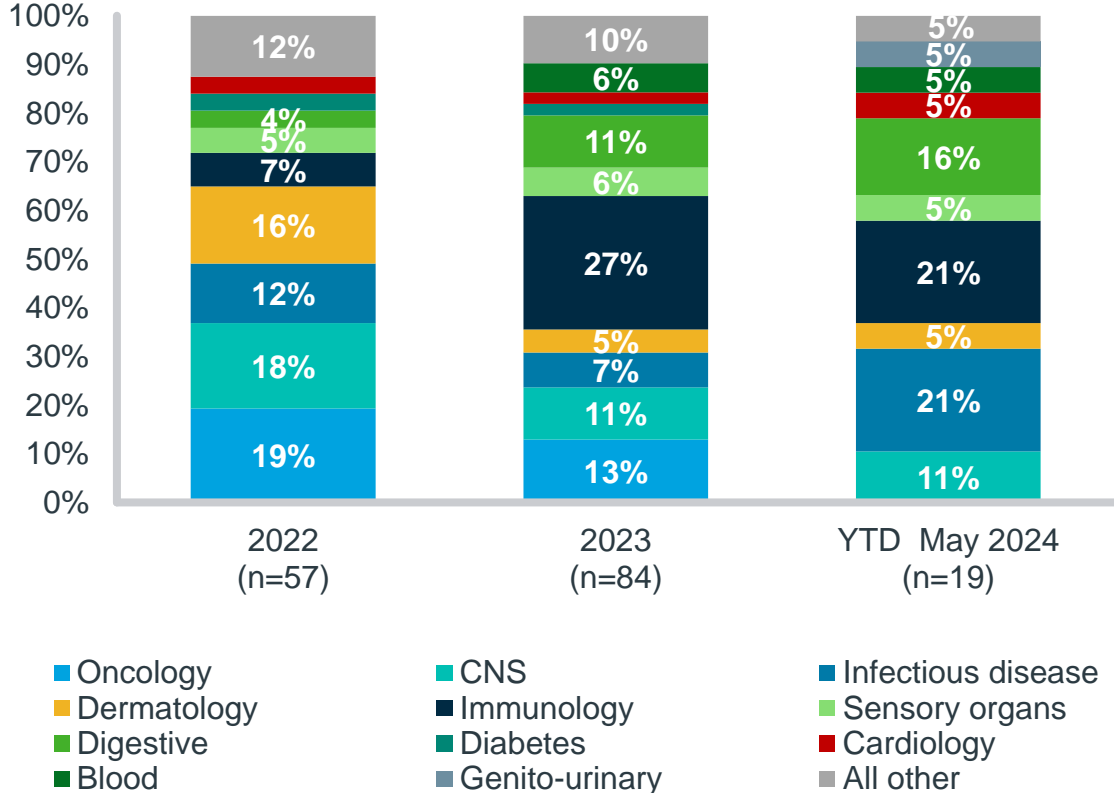
There have been 19 new launches through May 2024, which is slightly down from prior years

2023 closed with 84 total launches, surpassing the 57 launches in 2022

Time-aligned cumulative launches
2022–May 2024



Share of launches by therapy area
2022–May 2024

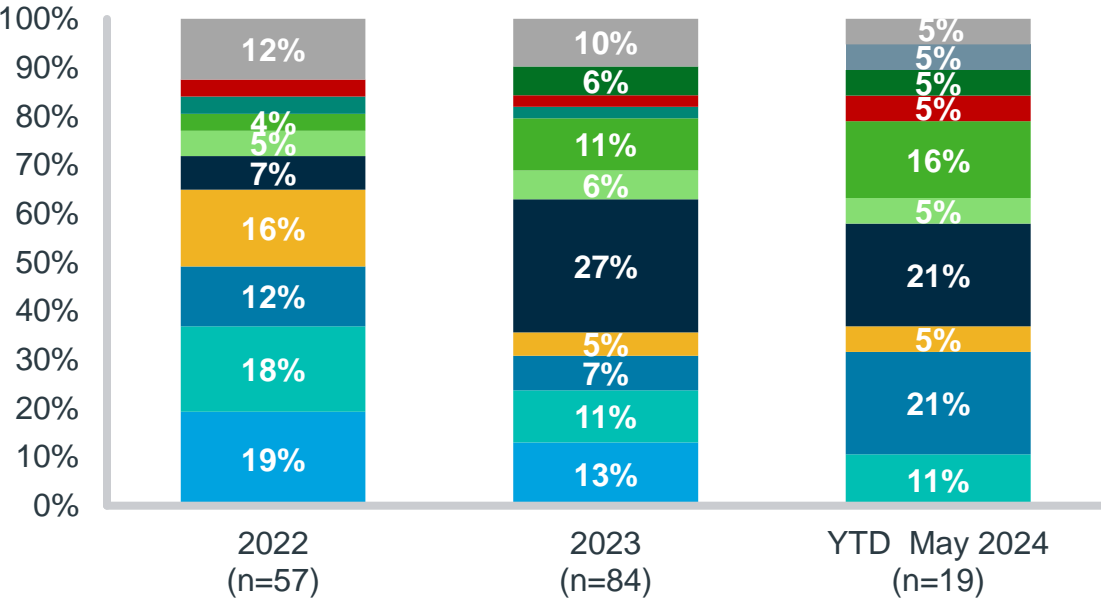


Source: National Sales Perspective; Launch Center of Excellence, IQVIA; publicly available information from the FDA
Notes: CNS = Central nervous system

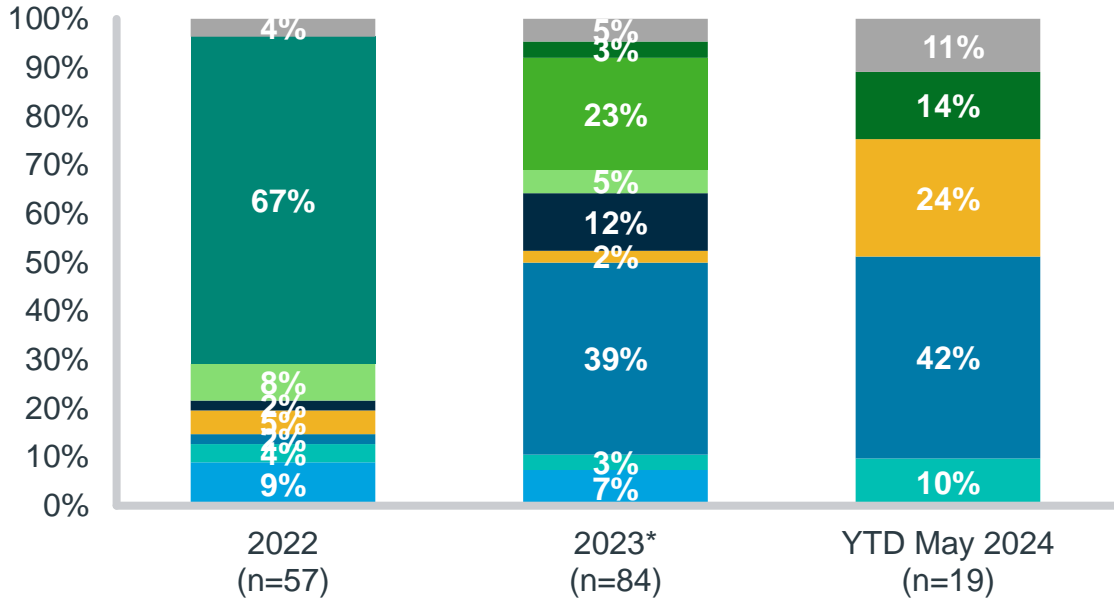
Therapy area mix remains similar, but sales shares are driven by transformative therapies like Mounjaro in 2022 and Arexvy in 2023

Bausch Health's Cabtreo is the only dermatology launch in 2024, yet it composes 24% of sales

Share of launches by therapy area
2022–May 2024



Share of sales by therapy area
2022–May 2024



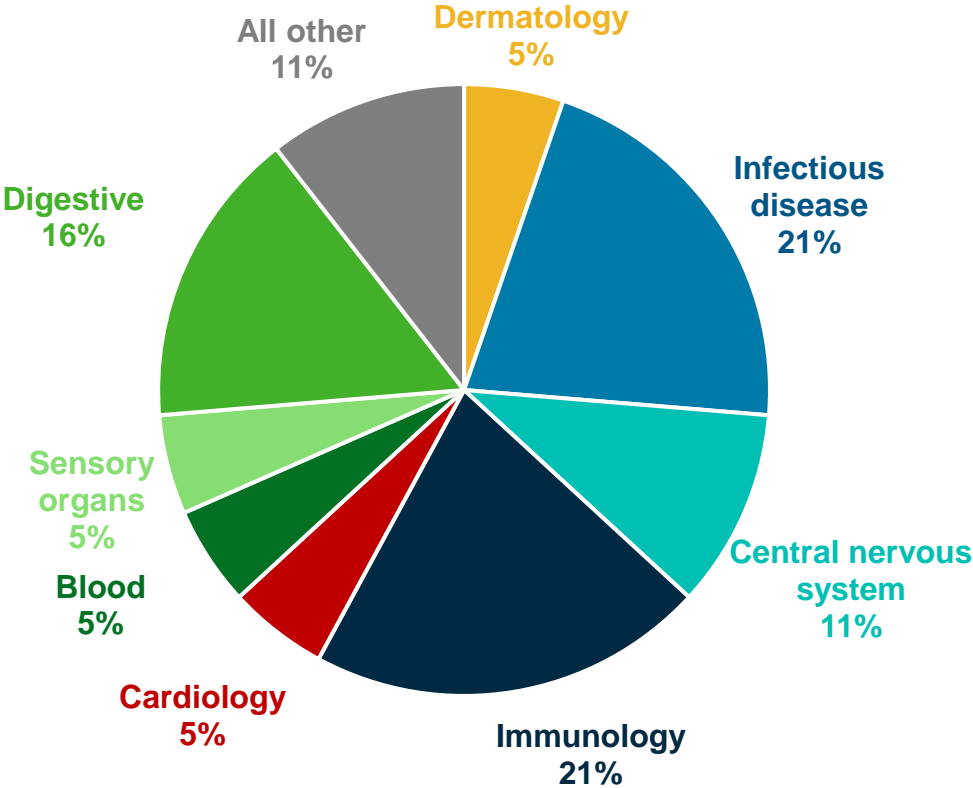
- Oncology
- CNS
- Infectious disease
- Dermatology
- Immunology
- Sensory organs
- Digestive
- Diabetes
- Cardiology
- Blood
- Genito-urinary
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Source: National Sales Perspective; Launch Center of Excellence, IQVIA; publicly available information from the FDA
 Notes: CNS = Central nervous system; RSV = Respiratory Syncytial Virus
 IQVIA U.S. Launch Landscape Tracker, May 2024

2024 launches are led by Pfizer's Octagam, for chronic immune thrombocytopenic purpura (cITP)

2024 – 19 Launches



2024 – Top 10 Performers

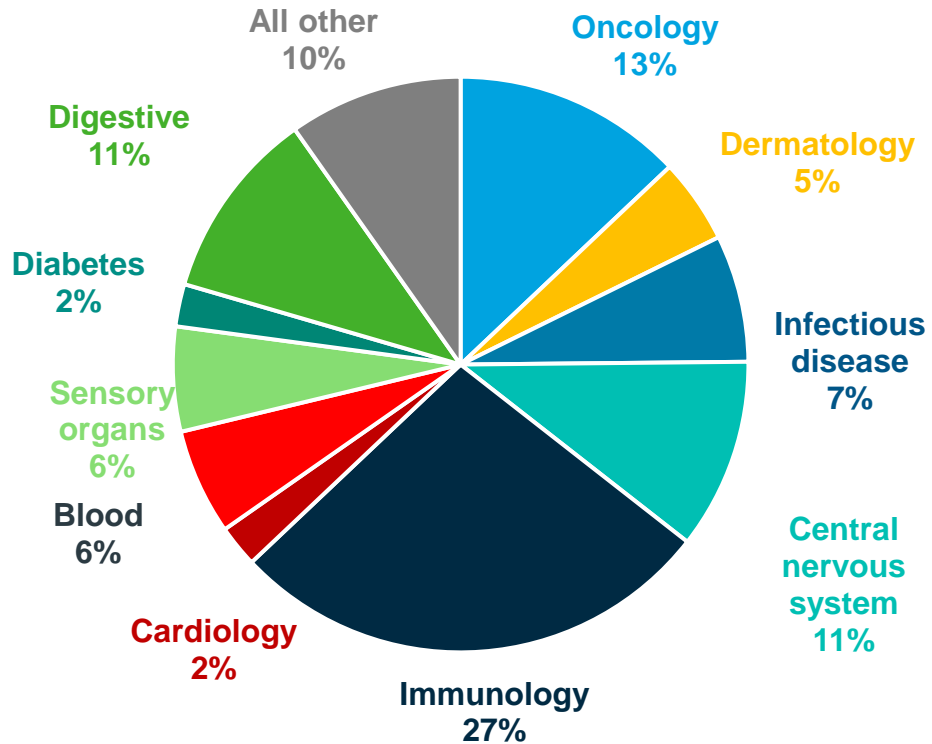
Product	Company	Indication	Launch date	First year gross sales (as of May-24)
Octagam <i>Immune globulin (IV)</i>	Pfizer	Chronic immune thrombocytopenic purpura (cITP)	Jan-24	\$44.9M
Cabtreo <i>clindamycin phosphate, adapalene & benzoyl peroxide</i>	Bausch Health	Acne	Feb-24	\$27.2M
Balfaxar <i>prothrombin complex concentrate, human-lans</i>	Octapharma	Reversal of warfarin-induced acquired coagulation factor deficiency	Jan-24	\$15.5M
Wainua <i>eplontersen</i>	AstraZeneca	Polyneuropathy from hereditary transthyretin amyloidosis (hATTR-PN)	Jan-24	\$11.4M
Veveye <i>cyclosporine</i>	Harrow Eye	Dry eye disease	Jan-24	\$7.4M
Rezdiffra <i>resmetirom tablets</i>	Madrigal	Nonalcoholic steatohepatitis (NASH)	Apr-24	\$1.7M
Elfabrio <i>pegunigalsidase alfa-iwxj</i>	Chiesi	Fabry disease	Mar-24	\$1.1M
Ixchiq <i>Chikungunya disease vaccine</i>	Valneva	Chikungunya disease	Feb-24	\$1.1M
Zymfentra <i>antihemophilic factor recombinant</i>	Celltrion	Maintenance of UC following IV infliximab	Mar-24	\$861K
Penbraya <i>meningitis vaccine</i>	Sanofi	Meningococcal meningitis	Jan-24	\$569K

Source: National Sales Perspective; Launch Center of Excellence, IQVIA
 Notes: All sales values are USD.
 cITP = chronic immune thrombocytopenic purpura;
 hATTR-PN = hereditary transthyretin amyloidosis
 NASH = Nonalcoholic steatohepatitis

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

Lilly's Zepbound for obesity is on its way to surpass \$2B in sales

2023 – 84 Launches



2023 – Top 10 Performers

Product	Company	Indication	Launch date	First year gross sales (as of May-24)
Arexvy <i>RSV vaccine</i>	GSK	Prevention of LRTD caused by RSV (60+ y/o)	Jul-23	\$2.01B
Zepbound <i>tirzepatide</i>	Lilly	Obesity	Dec-23	\$1.92B
Abrysvo <i>RSV vaccine</i>	Pfizer	RSV vaccine (gest. age 32-36wks, 60+ y/o)	Jul-23	\$1.09B
Altuviio <i>Antihemophilic factor recombinant</i>	Sanofi	Hemophilia A	Apr-23	\$264.5M
Beyfortus <i>nirsevimab</i>	Sanofi	RSV vaccine Pediatrics 0-24m	Sep-23	\$248.0M
Miebo <i>perfluorohexyloctane ophthalmic solution</i>	Bausch + Lomb	Dry eye disease	Sep-23	\$162.6M
Elahere <i>mirvetuximab soravtansine</i>	Immunogen	Ovarian, fallopian tube and peritoneal cancer	Mar-23	\$160.9M
Orserdu <i>elacestrant</i>	Stemline	ER+ / HER2- breast cancer	Feb-23	\$158.4M
Amjevita <i>adalimumab</i>	Amgen	CD, PsA, PsO, RA, UC	Feb-23	\$118.4M
Jaypirca <i>pirtobrutinib</i>	Eli Lilly	Mantle cell lymphoma	Feb-23	\$82.5M

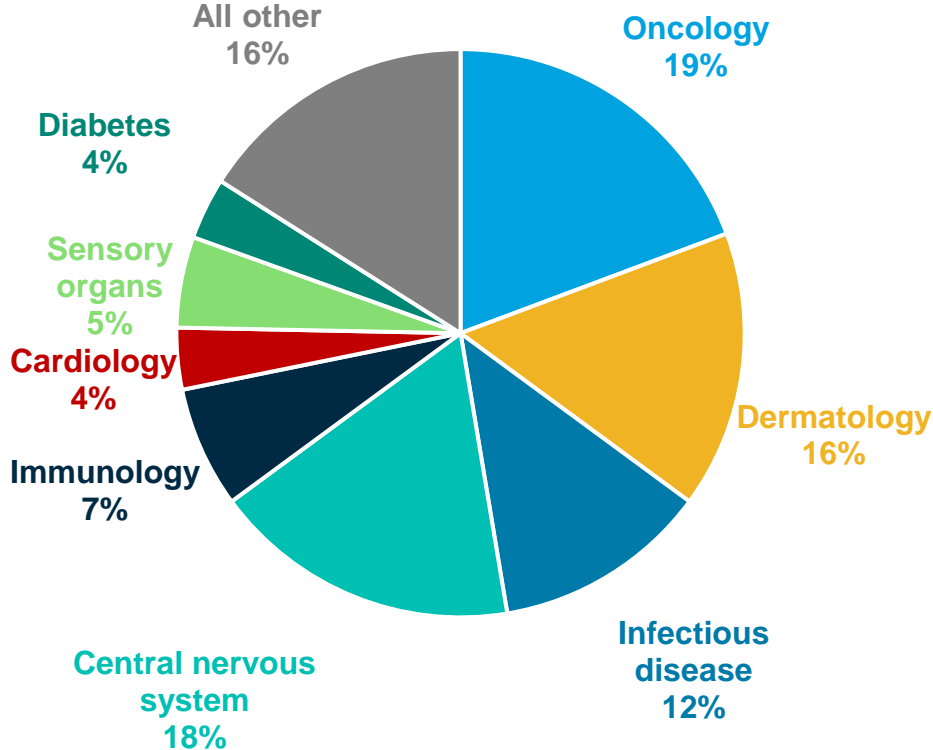
Source: National Sales Perspective; Launch Center of Excellence, IQVIA

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

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

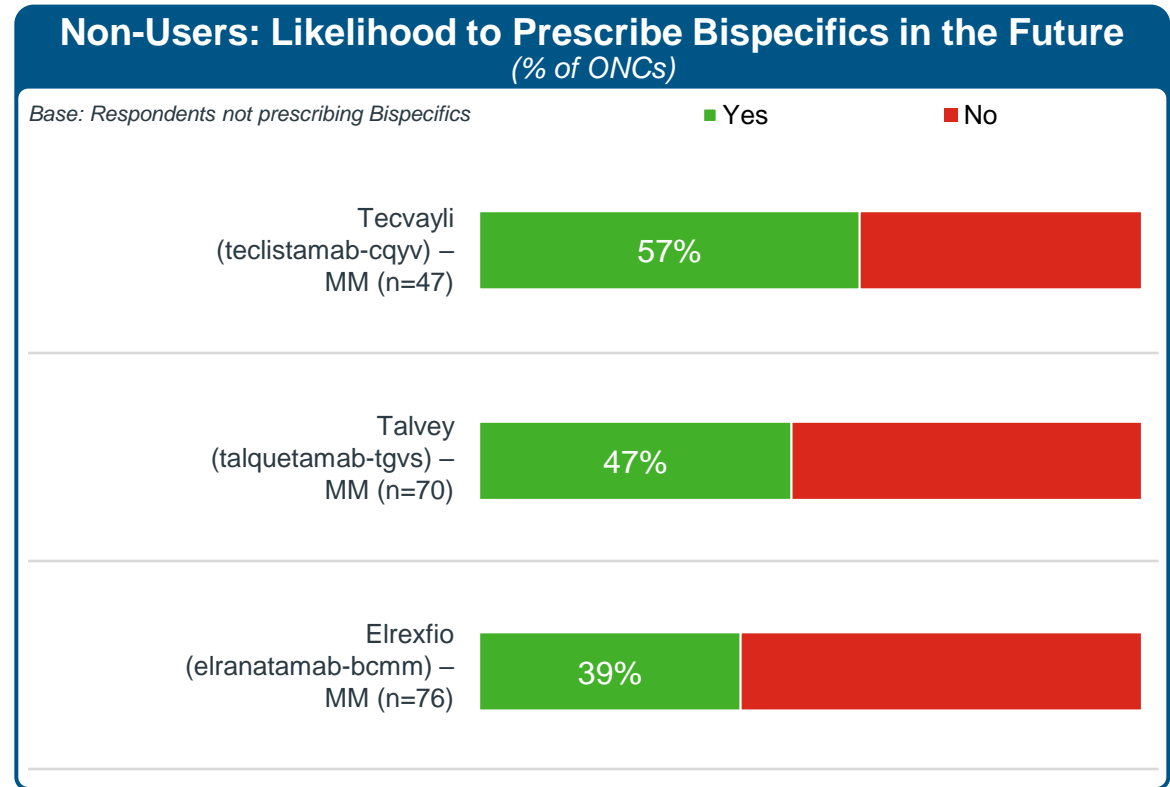
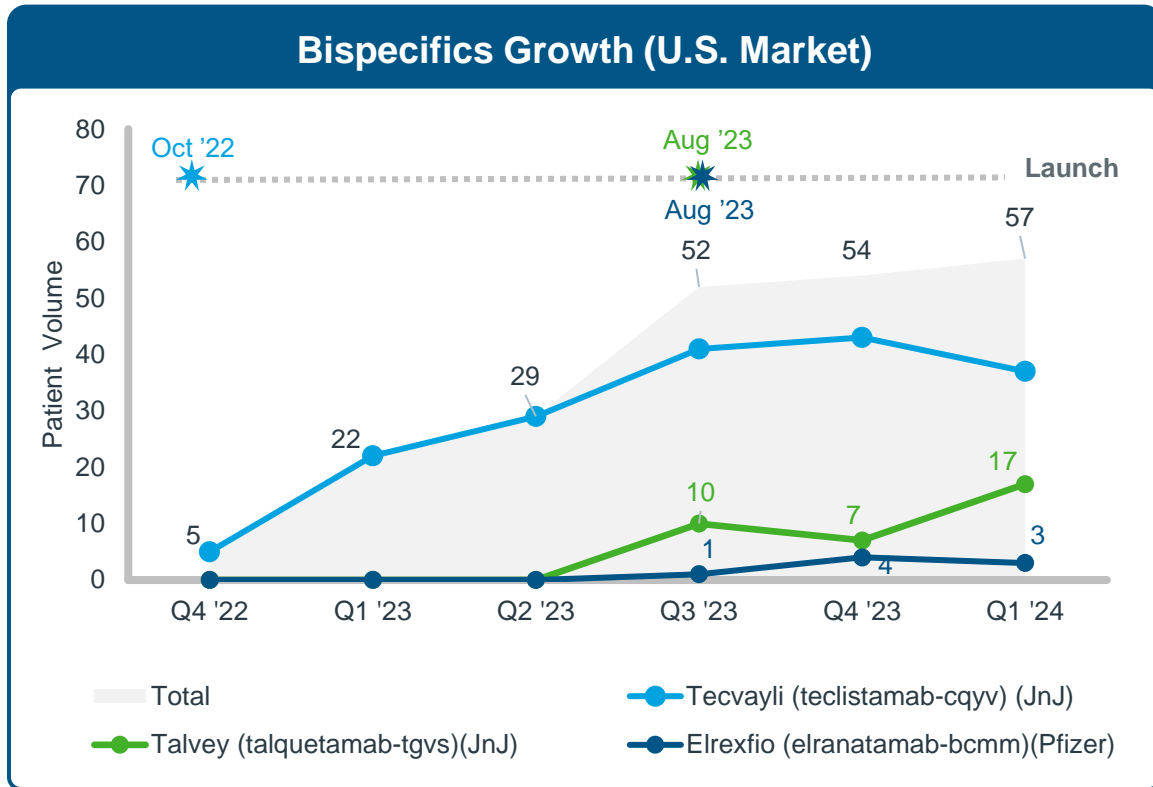
Source: National Sales Perspective; Launch Center of Excellence, IQVIA
Notes: All sales values are USD.

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Market Spotlight: CAR T-Cell Insights

The Bispecifics class continues to grow in Multiple Myeloma, and is primarily being driven by new launches

Referrers of Multiple Myeloma CAR T-Cell patients indicate a high likelihood of prescribing bispecifics increasing the pressure on the CAR T-Cell therapies



Bispecifics antibodies (BsAbs), also known as Bispecifics, are a type of antibody that can bind to two different antigens or epitopes (parts of antigens) at the same time. The dosing is complicated (usually monthly injections), but patients do not have to be referred to transplant centers.

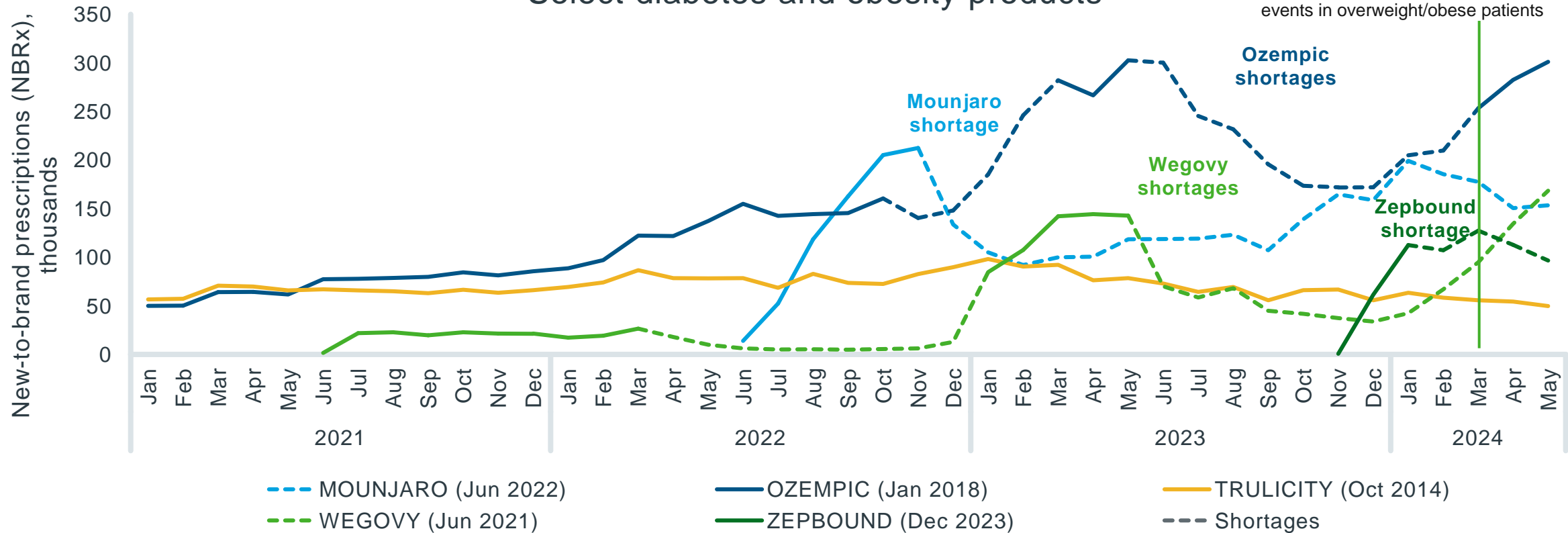
Source: Bispecifics patient volume: BrandImpact Oncology), Intent to prescribe: CAR T-Cell Referral Module
 [▲▼] indicates significant differences between Q1 '24 and Q4 '23 at 95% C.L.
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Despite still being in shortage, Wegovy is having success from its recent March 2024 approval in cardiovascular risk reduction

Other manufacturers prepare as favorable trial results emerge for GLP-1 use in sleep apnea, metabolic dysfunction-associated steatohepatitis (MASH) and kidney disease

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

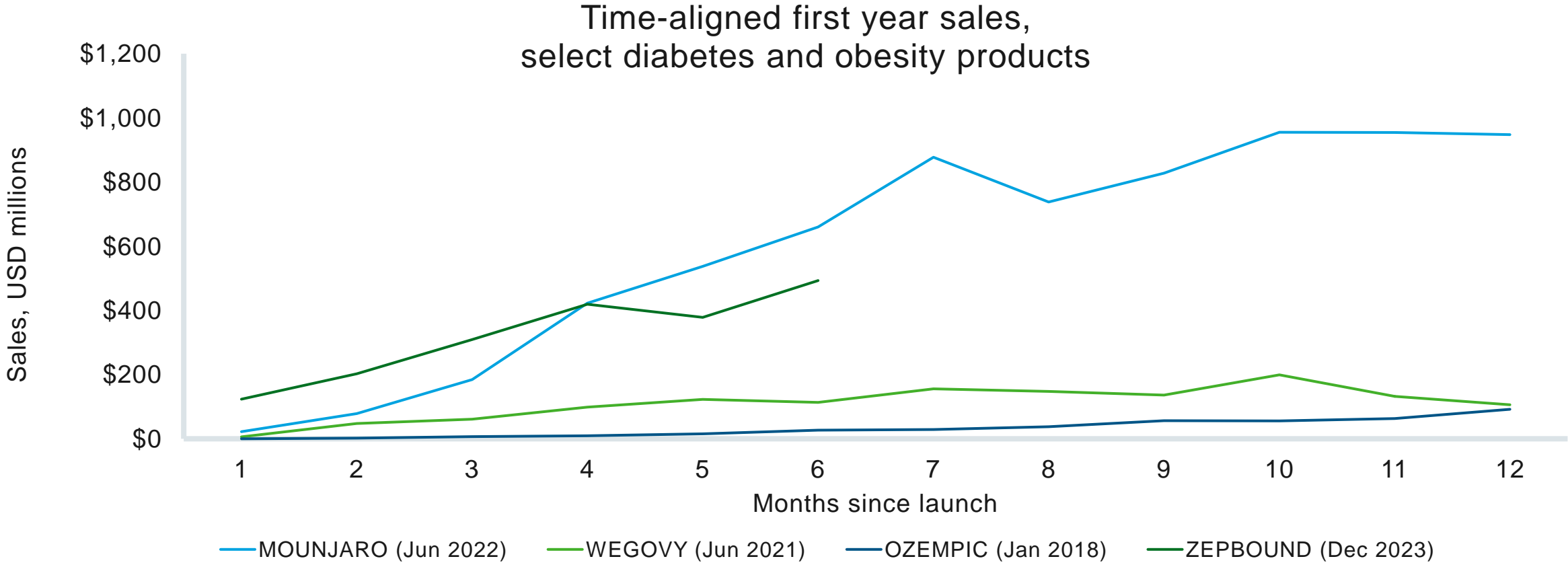


Mar. 2024: Wegovy receives label expansion to reduce risk of cardiovascular events in overweight/obese patients

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

From a sales perspective, Lilly's Zepbound has been 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