Launch Landscape
Monthly Launch Tracker

July 2024 Edition

Launches through July 2024
Monthly Sales data through July 2024

Issued by The IQVIA Launch Center of Excellence (LCoE) on September 18th, 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
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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
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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 July 2024

There have been 33 new launches through July 2024

Infectious Disease is the top therapy area in 2024, accounting for 27% of new product launches

33 new launches through July 2024

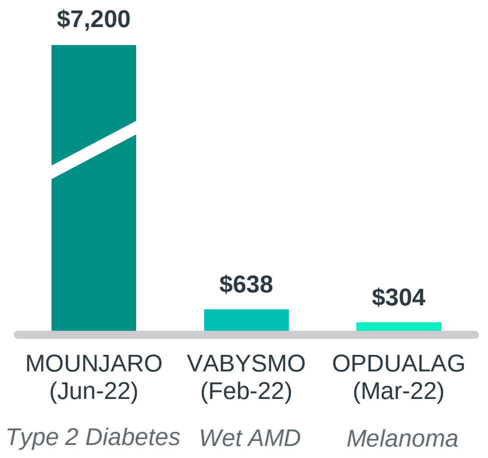
23 FDA Approved New Molecular Entities (NMEs) in 2024

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

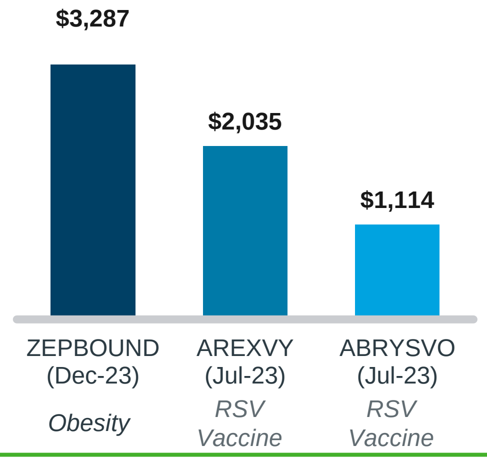
Top therapy areas *(share of launches)*

2024 n=33	Anti-infectives 27%	Immunology 15%	Digestive 12%
2023 n=84	Oncology 25%	Immunology 14%	Digestive 11%
2022 n=54	Oncology 20%	CNS 19%	Dermatology 17%

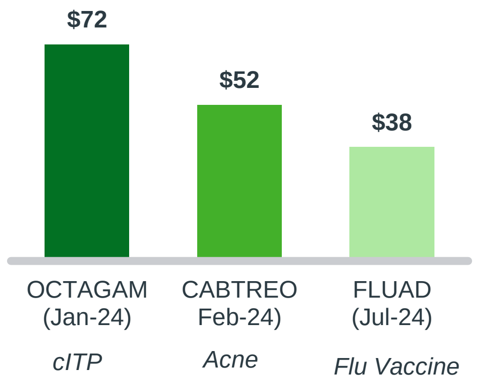
Top 2022 launches by sales (USD millions)



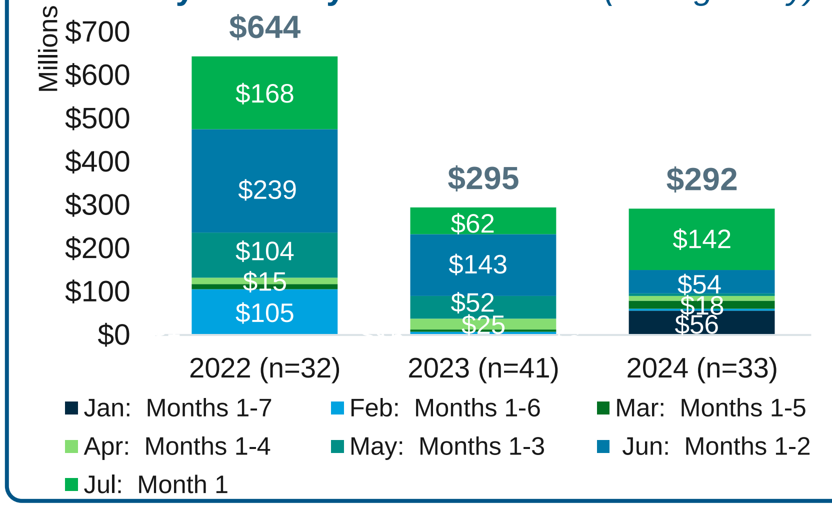
Top 2023* launches by sales (USD millions)



Top 2024* launches by sales (USD millions)



Monthly Sales by Launch Month *(through July)*



*First year sales from launch month through July 2024

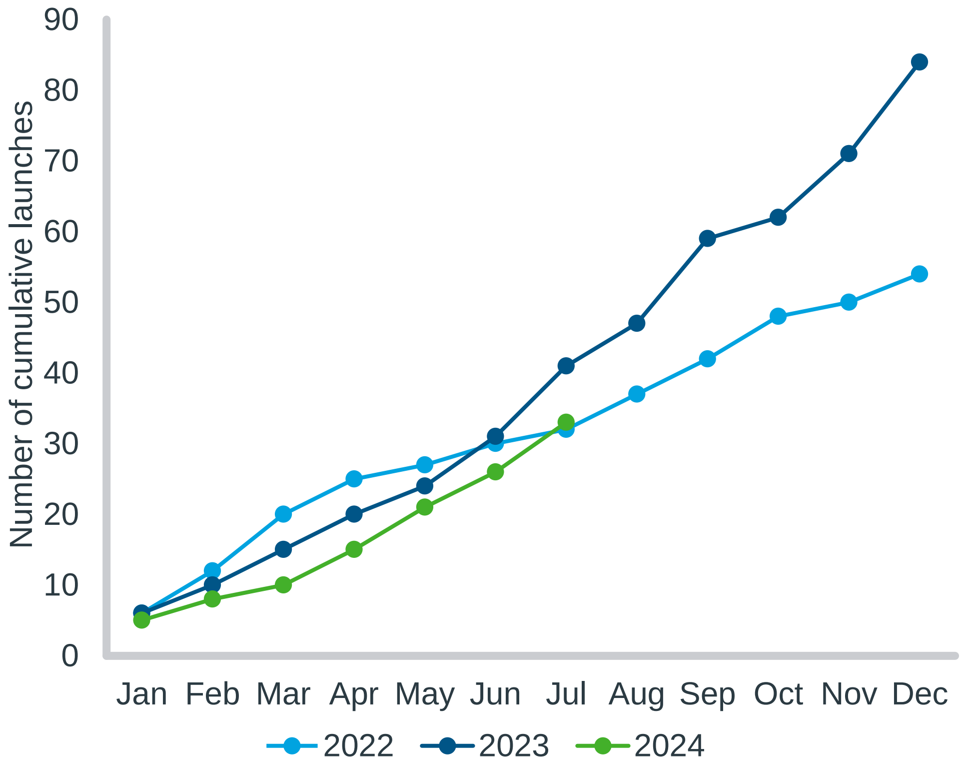
Notes: All sales values are USD. cITP = Chronic immune thrombocytopenic purpura; CNS = Central nervous system; NME = new molecular entity

IQVIA U.S. Launch Landscape Tracker, July 2024

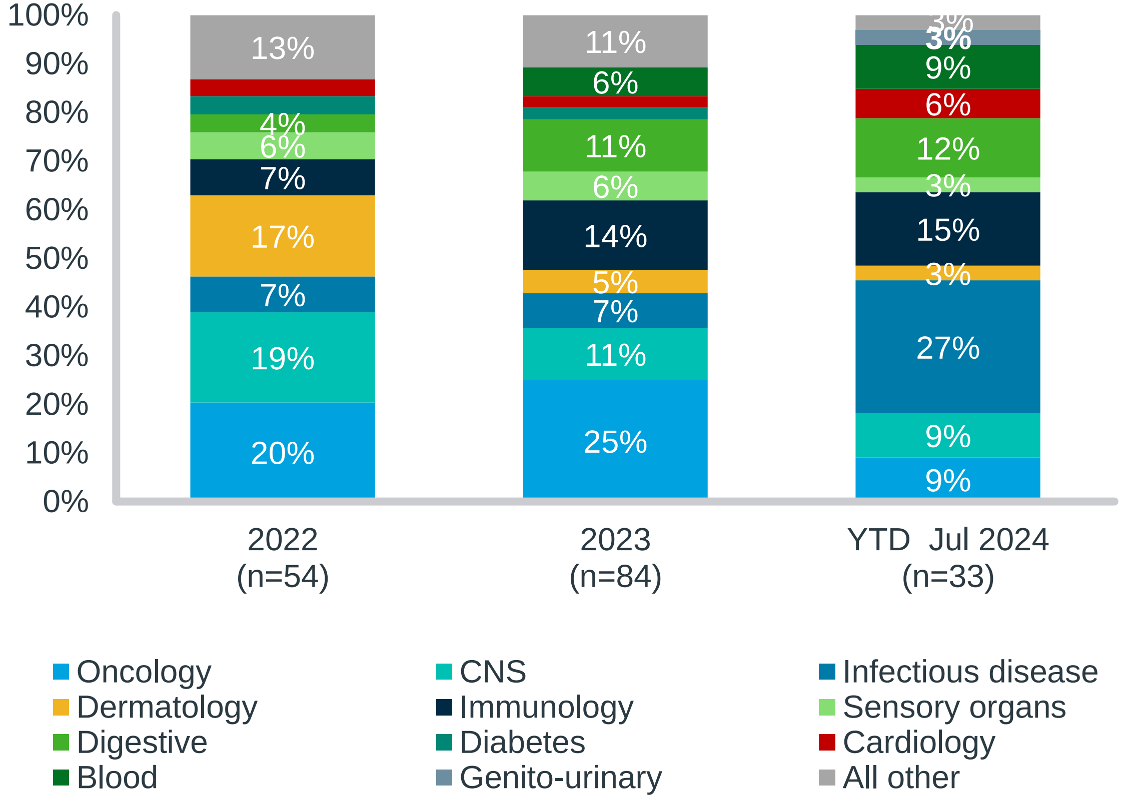
There have been 33 new launches through July 2024, tracking closely with prior years

2023 closed with 84 total launches, surpassing the 54 launches in 2022

Time-aligned cumulative launches
2022–Jul 2024

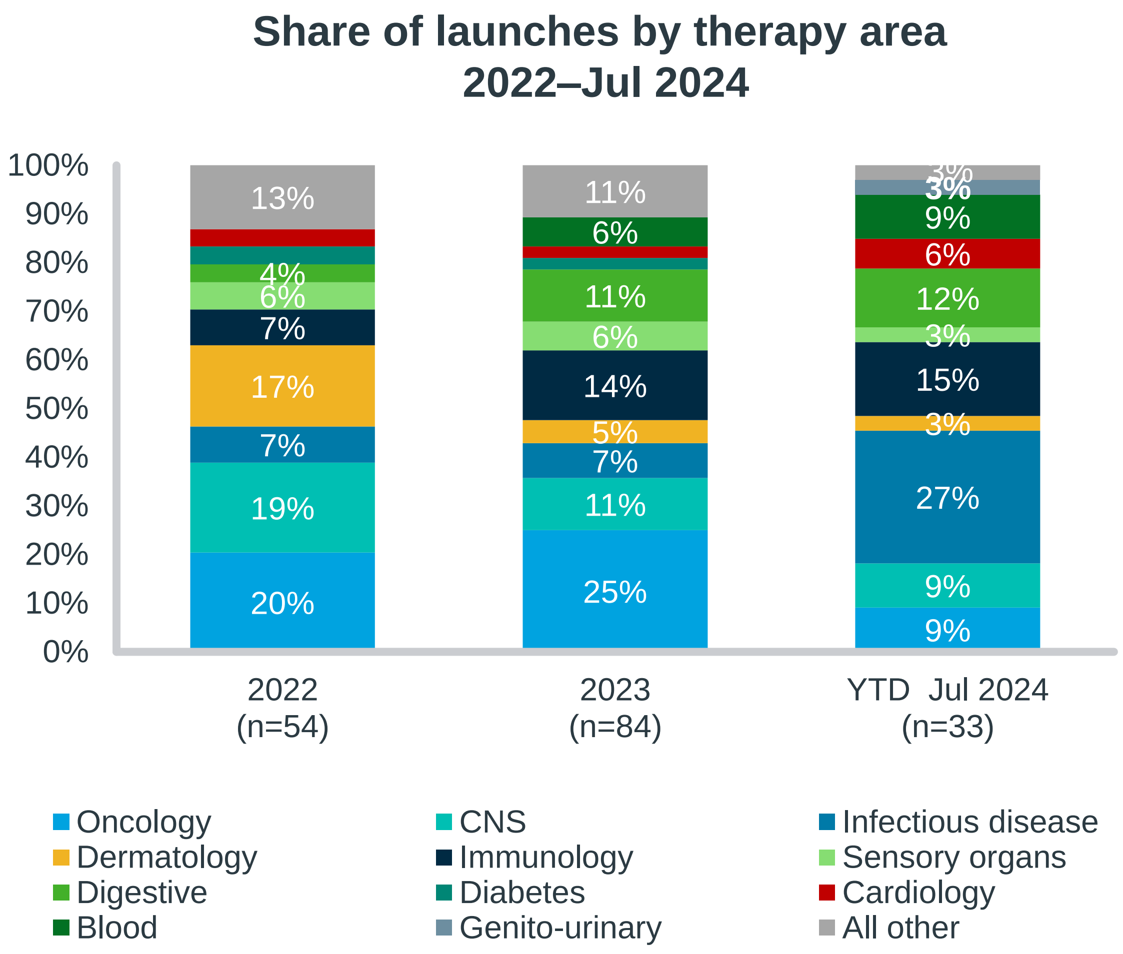


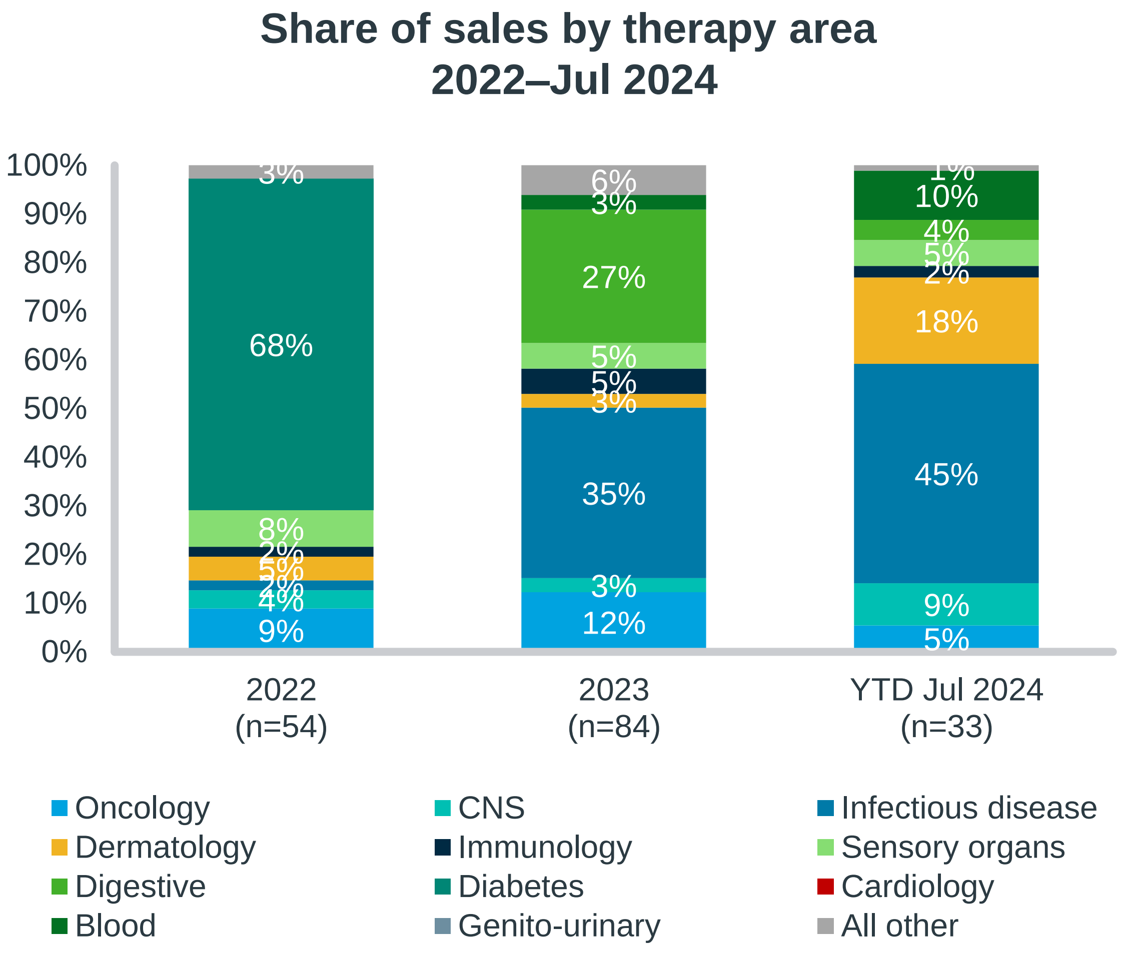
Share of launches by therapy area
2022–Jul 2024



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

Through July, Infectious Disease and Dermatology products account for 30% of 2024 launches and 63% of 2024 sales

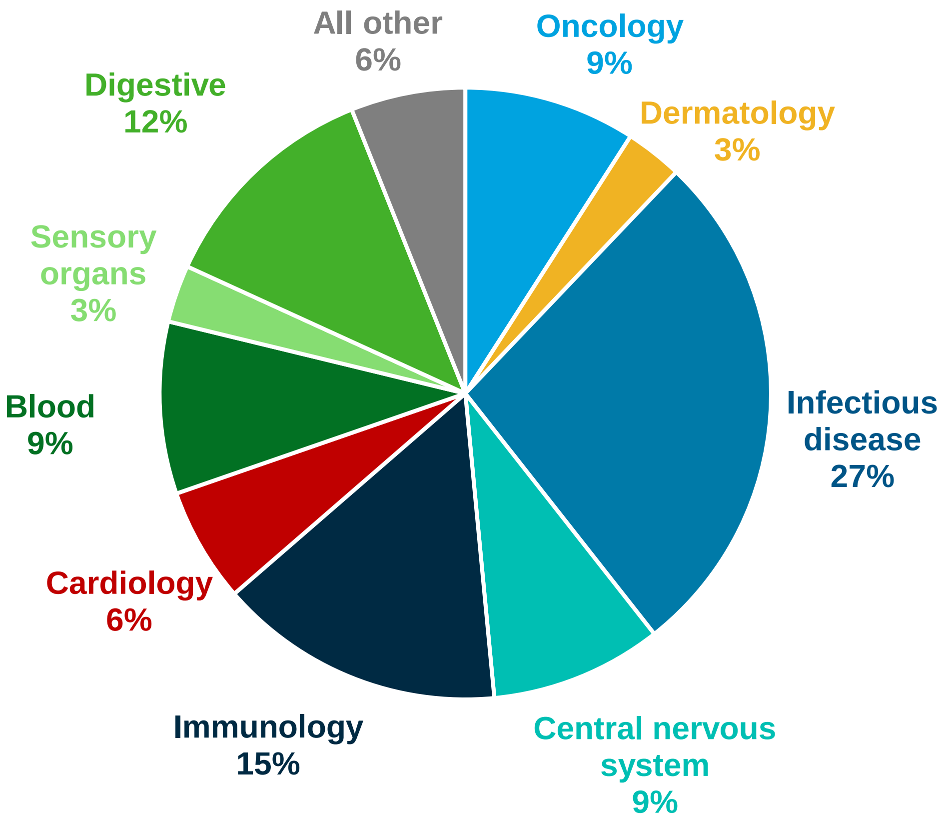




Source: National Sales Perspective; Launch Center of Excellence, IQVIA; publicly available information from the FDA
Notes: CNS = Central nervous system; RSV = Respiratory Syncytial Virus

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

2024 – 33 Launches



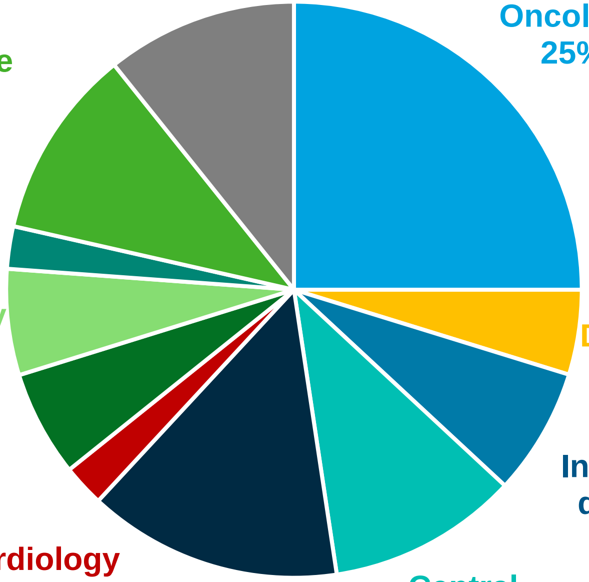
2024 – Top 10 Performers

Product	Company	Indication	Launch date	First year gross sales (as of Jul-24)
Octagam *Immune globulin (IV)*	Pfizer	Chronic immune thrombocytopenic purpura (cITP)	Jan-24	$71.8M
Cabtreo *clindamycin phosphate, adapalene & benzoyl peroxide*	Bausch Health	Acne	Feb-24	$51.8M
Fluad *Influenza Vaccine*	CSL Seqirus	Influenza vaccine ages 65+	Jul-24	$37.8M
Balfaxar *prothrombin complex concentrate, human-lans*	Octapharma	Reversal of warfarin-induced acquired coagulation factor deficiency	Jan-24	$28.7M
Wainua *eplontersen*	AstraZeneca	Polyneuropathy from hereditary transthyretin amyloidosis (hATTR-PN)	Jan-24	$25.0M
Vevye *cyclosporine*	Harrow Eye	Dry eye disease	Jan-24	$15.6M
Flucelvax *Influenza vaccine*	CSL Seqirus	Influenza vaccine ages 6+ months	Jul-24	$14.8M
Imdelltra *tarlatamab-dlle*	Amgen	Extensive-stage small cell lung cancer (ES-SCLC)	May-24	$11.9M
Rezdiffra *resmetirom tablets*	Madrigal	Nonalcoholic steatohepatitis (NASH)	Apr-24	$9.0M
Zymfentra *antihemophilic factor recombinant*	Celltrion	Maintenance of UC following IV infliximab	Mar-24	$3.5M

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

Having surpassed $3B in sales in July 2024, Lilly's Zepbound for obesity leads 2023's 2nd highest performer, Arexvy, by over $1B

2023 – 84 Launches



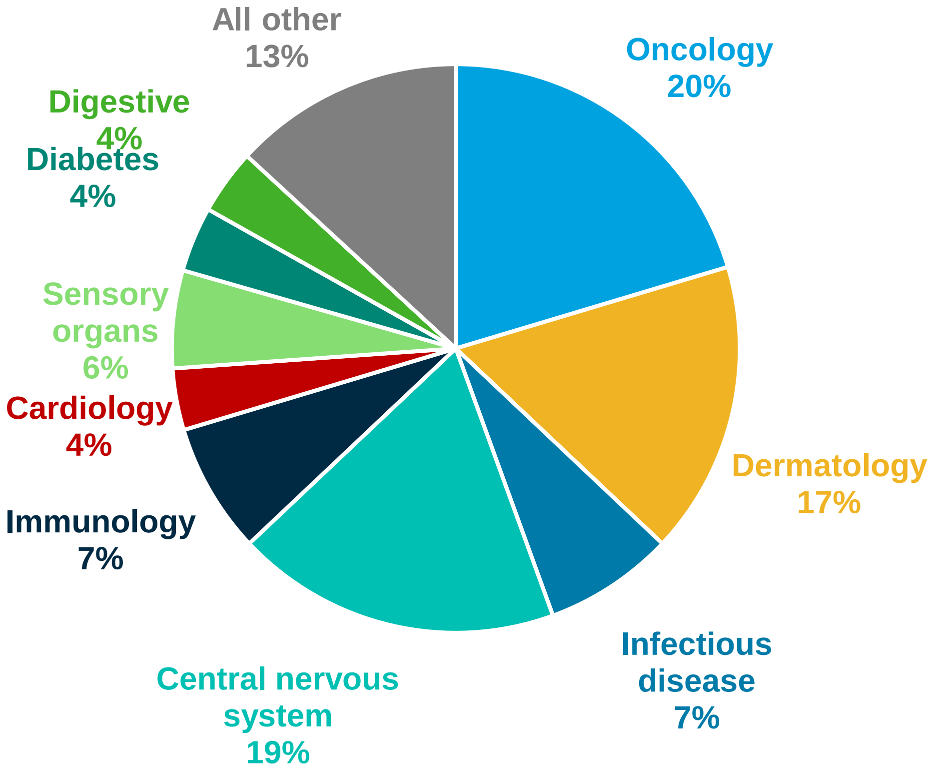
2023 – Top 10 Performers

Product	Company	Indication	Launch date	First year gross sales (as of Jul-24)	First year NBRx (as of 8/2/24)
Zepbound *tirzepatide*	Lilly	Obesity	Dec-23	$3.29B	888K
Arexvy *RSV vaccine*	GSK	Prevention of LRTD caused by RSV (60+ y/o)	Jul-23	$2.04B	7.5M
Abrysvo *RSV vaccine*	Pfizer	RSV vaccine (gest. age 32-36wks, 60+ y/o)	Jul-23	$1.11B	3.5M
Miebo *perfluorohexyloctane ophthalmic solution*	Bausch + Lomb	Dry eye disease	Sep-23	$293.4M	161.7K
Bimzelx *bimekizumab-bkzx*	UCB	Plaque Psoriasis	Nov-23	$271.0M	9.4K
Altuviiio *Antihemophilic factor recombinant*	Sanofi	Hemophilia A	Apr-23	$264.5M	N/A
Beyfortus *nirsevimab*	Sanofi	RSV vaccine Pediatrics 0-24m	Sep-23	$250.1M	N/A
Hyrimoz *adalimumab-adaz*	Sandoz	RA, UC, PsA/PsO, CD	Jul-23	$233.2M	3.9K
Talvey *mirvetuximab soravtansine*	Janssen	Multiple myeloma	Aug-23	$182.1M	N/A
Izervay *avacinaptad pegol intravitreal solution*	Astellas	Geographic atrophy and dry AMD	Feb-23	$176.8M	N/A

Source: National Sales Perspective; Launch Center of Excellence, IQVIA
Notes: All sales values are USD. AMD = Age-related macular degeneration; 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 was the top selling product of 2022, followed by Genentech's Vabysmo for wet macular degeneration

2022 – 54 Launches



2022 – Top 10 Performers

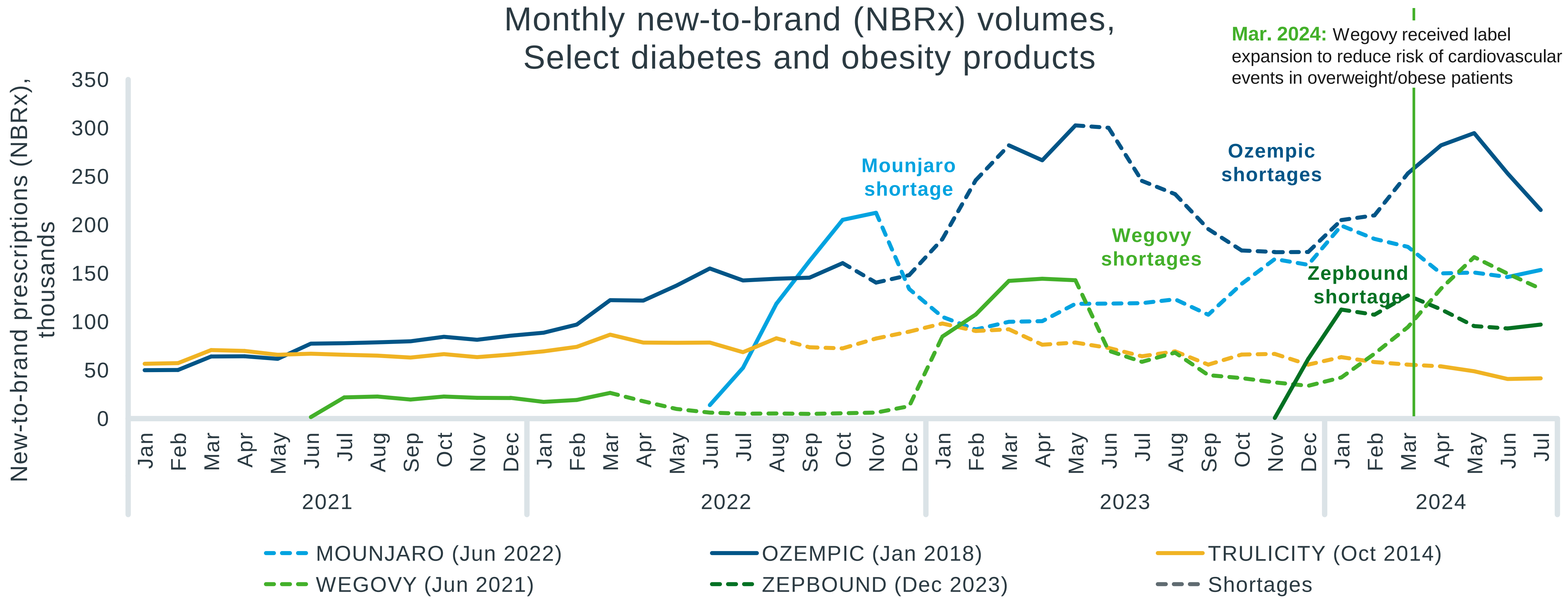
Product	Company	Indication	Launch date	First year gross sales
Mounjaro *tirzepatide*	Eli Lilly	Type 2 diabetes	Jun-22	$7.2B
Vabysmo *faricimab*	Genentech	Wet macular degeneration	Feb-22	$632.4M
Opdualag *nivolumab/relatlimab*	BMS	Metastatic melanoma	Mar-22	$304.1M
Radicava *edaravone*	Mitsubishi Tanabe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

Source: National Sales Perspective; Launch Center of Excellence, IQVIA
Notes: All sales values are USD. As of June 2024, All COVID-19 Vaccinations launched in 2022 have been removed due to emergency authorization expiration

Market Spotlight: Obesity and Diabetes

Wegovy is having success from its recent March 2024 approval in cardiovascular risk reduction

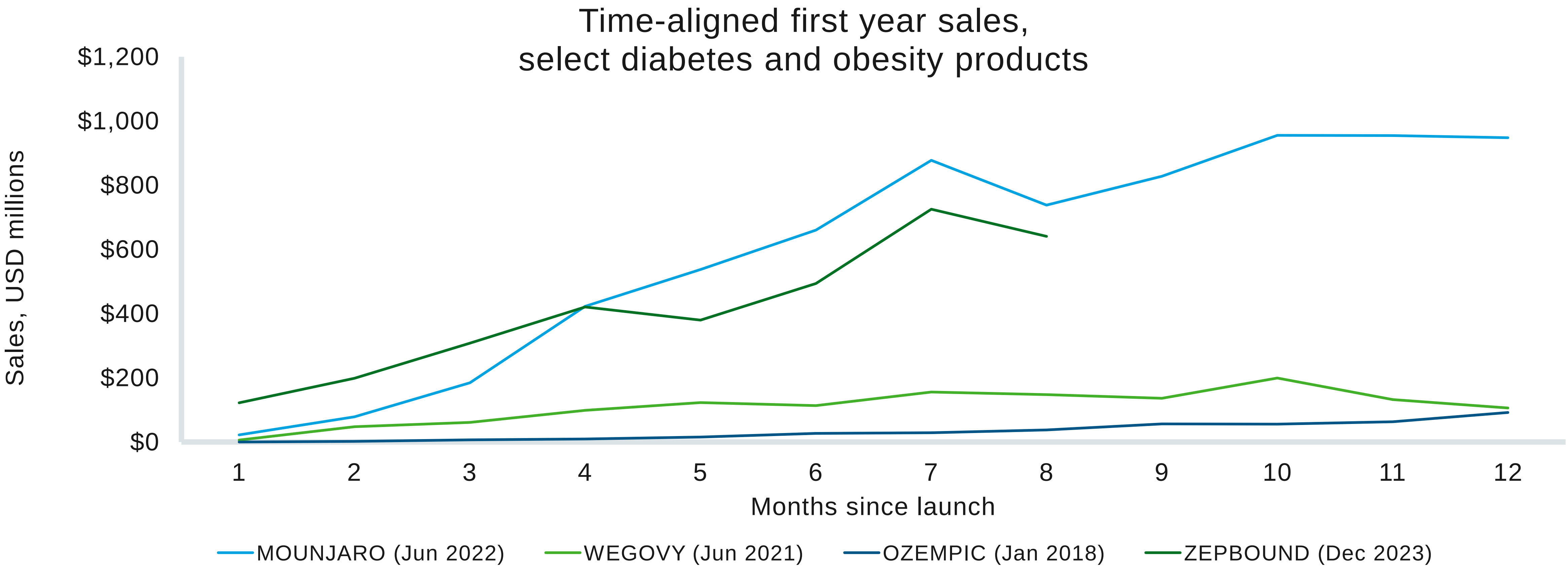
In late August, Lilly revealed significant findings from the SURMOUNT-1 study, where tirzepatide reduced the risk of obese pre-diabetics progressing to type 2 diabetes by 94% versus placebo



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

From a sales perspective, Lilly's Zepbound is having a similar year-one trajectory to its predecessor, Mounjaro

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



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

Select Diabetes and Obesity Products