



# Launch Landscape: Monthly Launch Tracker

## *September 2023 Edition*


*Launches through September 2023*  
*Monthly sales data through August 2023*

Issued by Launch COE on October 31<sup>st</sup>, 2023




# Executive Summary

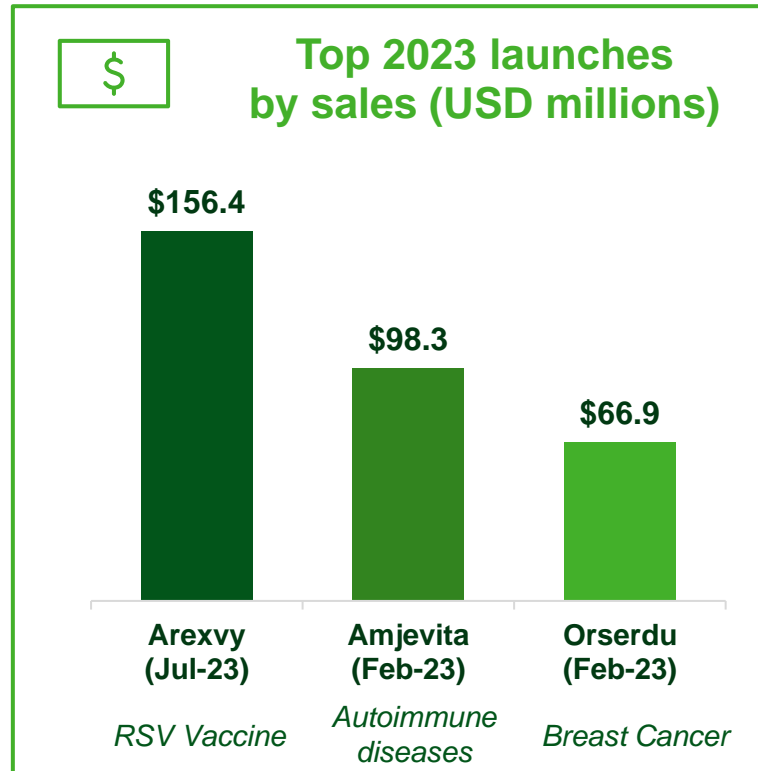
Through September 2023 there have been 50 launches, compared to 47 launches through September 2022; Immunology is the top therapy area in 2023, accounting for 32% of new product launches

**50**  
Launches in 2023



**Top therapy areas of 2023 launches**

<b>Immunology</b>	<b>Oncology</b>	<b>Nervous</b>
		
<b>32%</b>	<b>20%</b>	<b>12%</b>



**38**

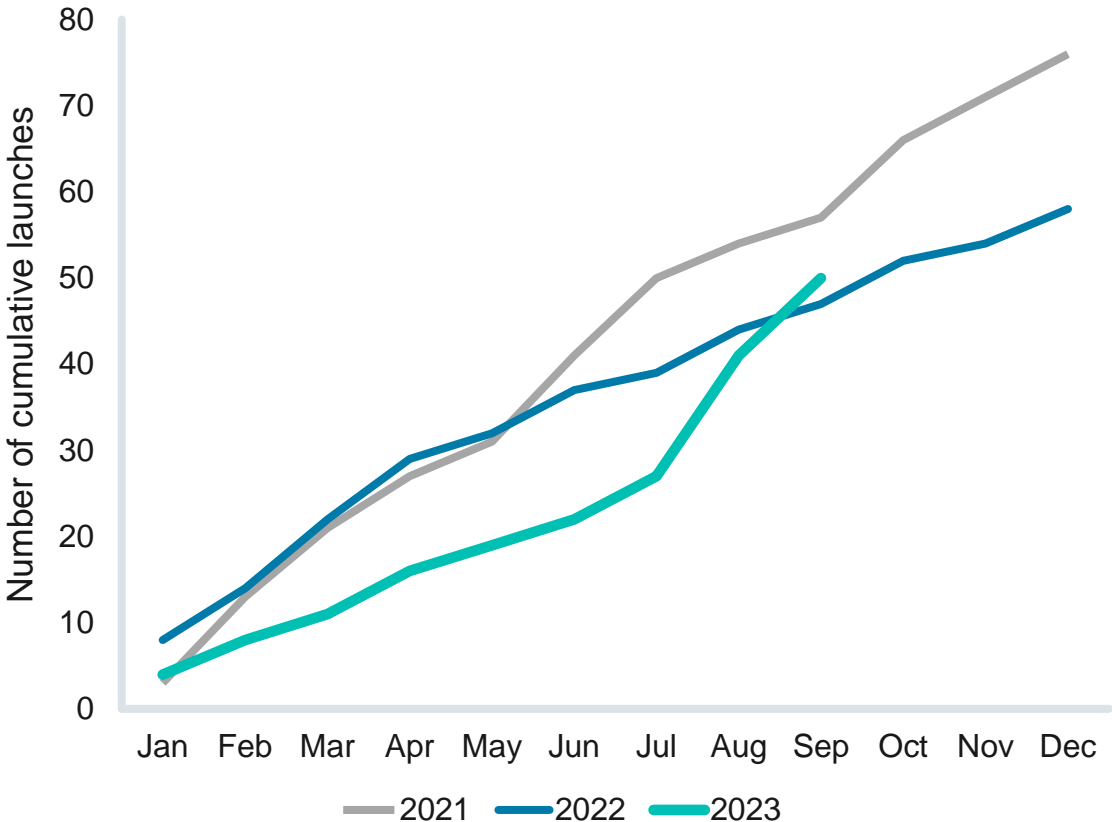


Of the 39 FDA approved New Molecular Entities (NMEs) in 2023 show evidence of launch based on supply in channel or active websites

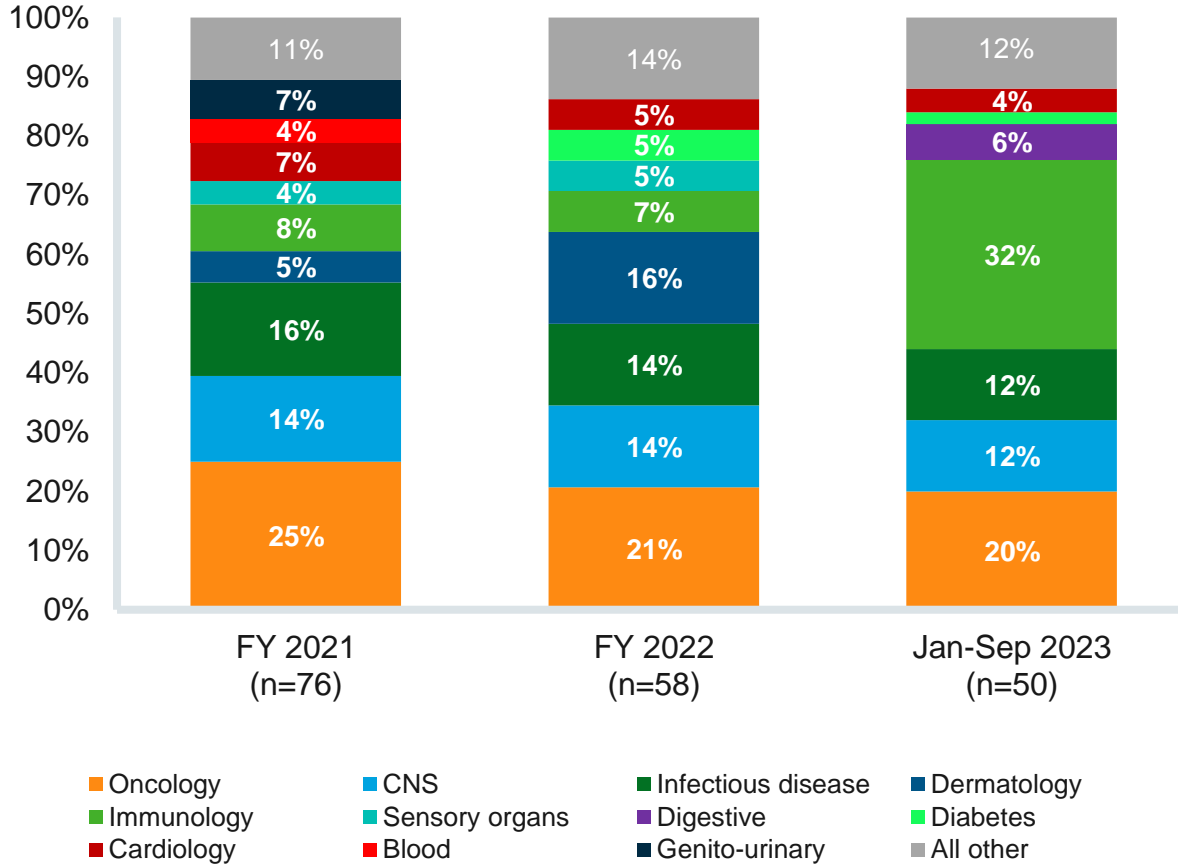
In 2022, the FDA approved 36 New Molecular Entities (NMEs). Of those 33 showed evidence of launch

# The number of cumulative launches through September 2023 is tracking competitively with 2021 and 2022

### Time-aligned cumulative launches 2021–Sep 2023



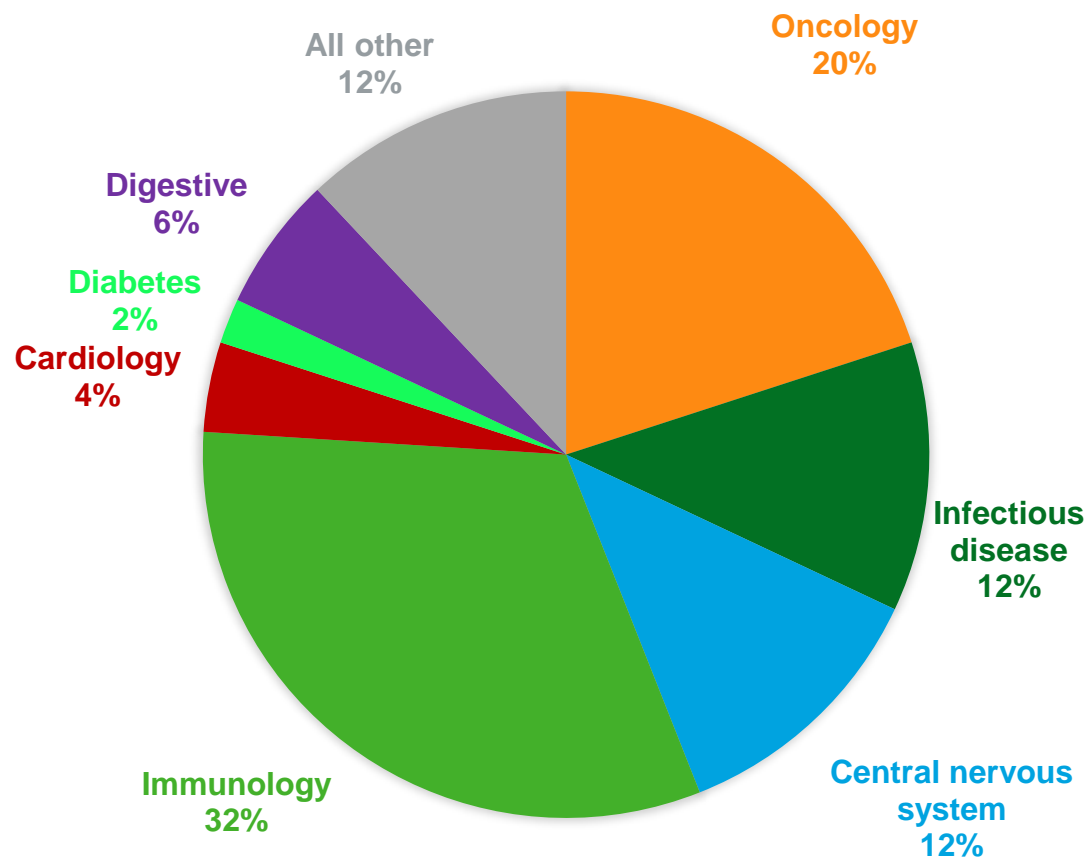
### Launches by therapy area 2021–Sep 2023



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

# GSK's Arexvy vaccine for the prevention of LRTD caused by RSV, is the top selling product in 2023, followed by Amgen's Amjevita (adalimumab)

## 2023 – 50 Launches



## 2023 – Top 10 Performers

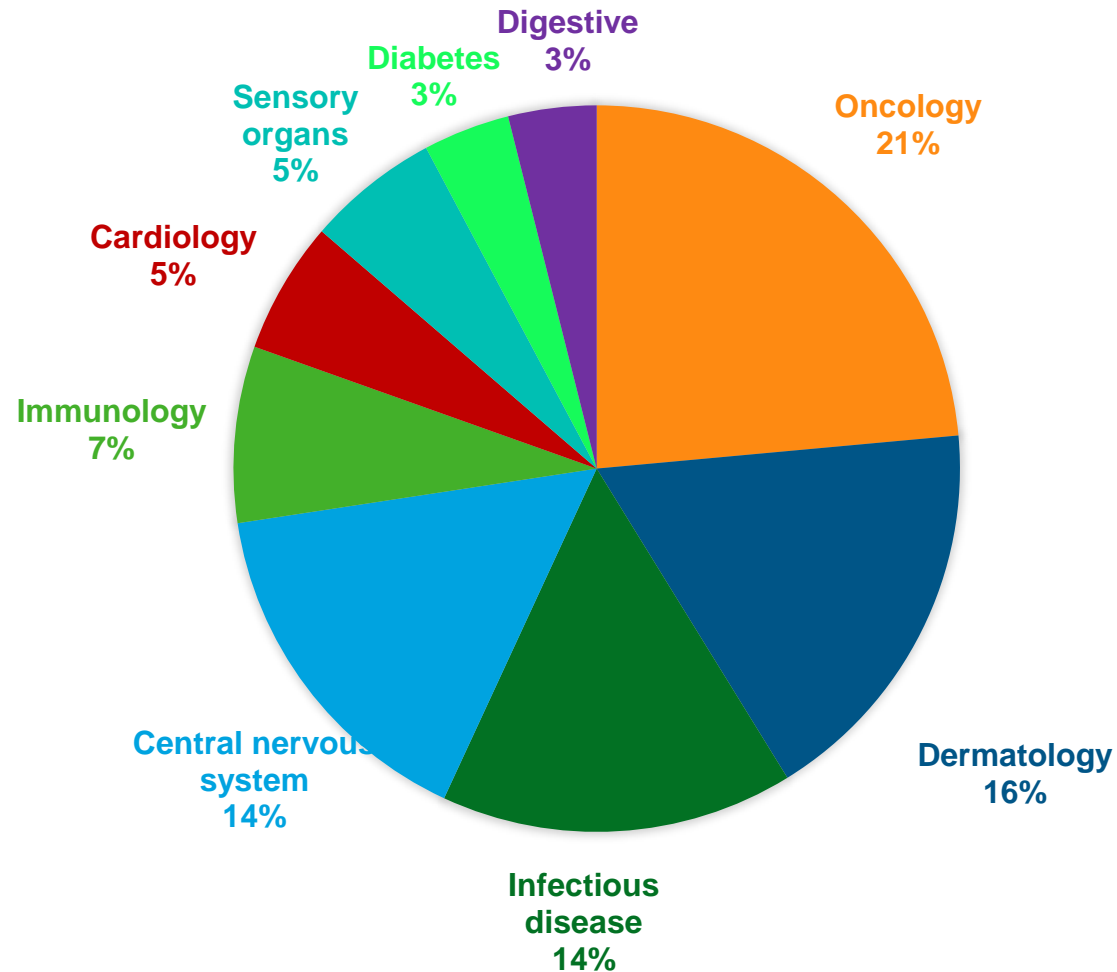
Product	Company	Indication	Launch	First year gross sales (as of 9/2023)
Arexvy <i>RSV vaccine</i>	GSK	Prevention of LRTD caused by RSV	Jul-23	\$156.3M
Amjevita <i>adalimumab</i>	Amgen	RA, PsA, PsO, CD, UC	Feb-23	\$98.3M
Orserdu <i>elacestrant</i>	Stemline	Breast cancer	Feb-23	\$66.9M
Elahere <i>mirvetuximab soratansine</i>	Immunogen	Ovarian, fallopian tube and peritoneal cancer	Mar-23	\$58.5M
Abrysvo <i>RSV vaccine</i>	Pfizer	RSV vaccine	Jul-23	\$49.1M
Briumvi <i>ublituximab</i>	TG	Multiple sclerosis	Jan-23	\$31.6M
Lunsumio <i>mosunetuzumab</i>	Genentech	Follicular lymphoma	Jan-23	\$29.3M
Jaypirca <i>pirtobrutinib</i>	Eli Lilly	Mantle cell lymphoma	Feb-23	\$27.2M
Sunlenca <i>lenacapavir</i>	Gilead	HIV	Jan-23	\$10.0M
Lupron DEP-PED <i>Leuprolide acetate</i>	AbbVie	Early puberty suppression	May-23	\$8.0M

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

Notes: All sales values are USD. LRTD = Lower Respiratory Tract Disease; RA = rheumatoid arthritis; PsA = psoriatic arthritis; PsO = plaque psoriasis; CD = Crohn's disease; UC = ulcerative colitis

# Lilly's Mounjaro (tirzepatide) is the best-selling product of 2022 launches, followed by Genentech's Vabysmo (faricimab) for wet macular degeneration

## 2022 – 58 Launches



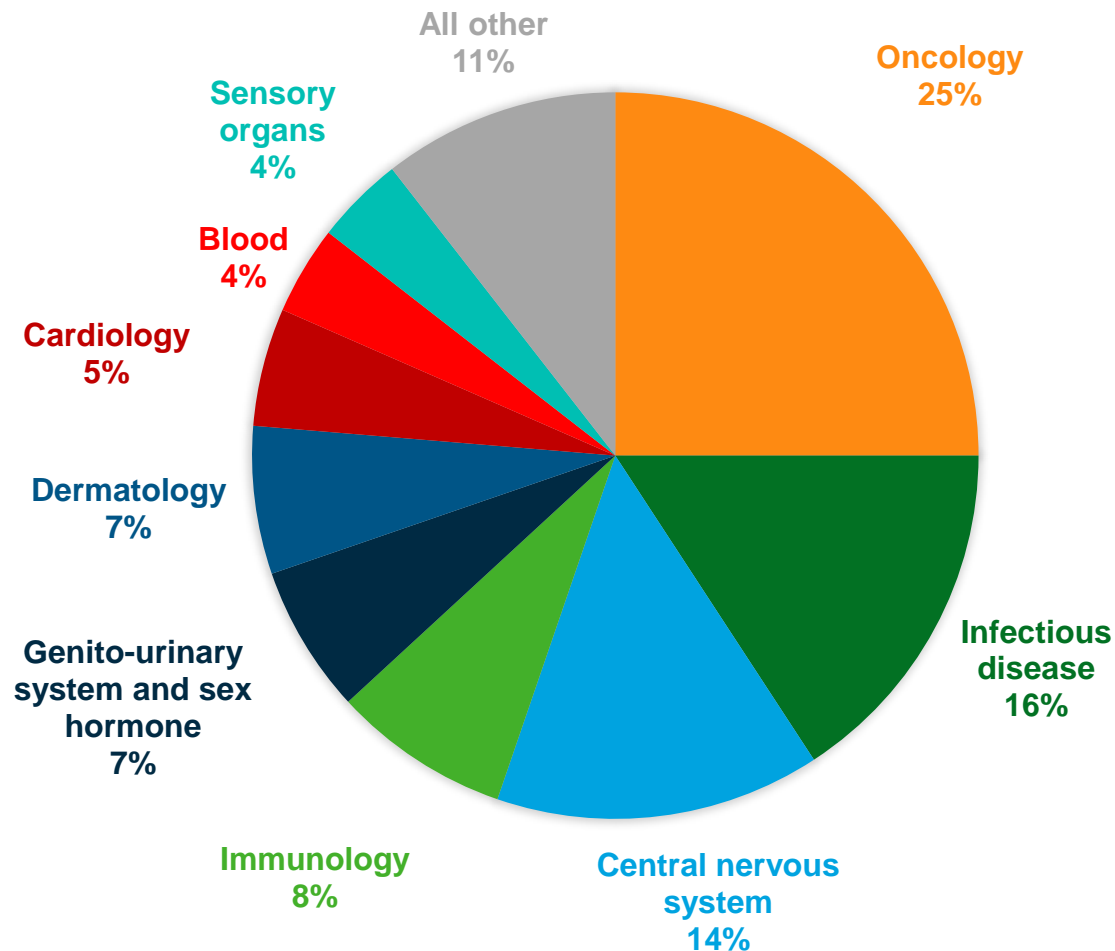
## 2022 – Top 10 Performers

Product	Company	Indication	Launch	First year gross sales (as of 9/2023)
Mounjaro <i>tirzepatide</i>	Eli Lilly	Type 2 diabetes	Jun-22	\$7.19B
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
Kimtrak <i>tebentafusp</i>	Immunocore	Uveal melanoma	Feb-22	\$101.3M
Leqvio <i>inclisiran</i>	Novartis	Atherosclerosis	Jan-22	\$59.1M

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

# Novo Nordisk's Wegovy (semaglutide) for obesity led 2021 launches in sales, followed by Pfizer's Prevnar 20, a 20-valent pneumococcal vaccine

## 2021 – 76 Launches

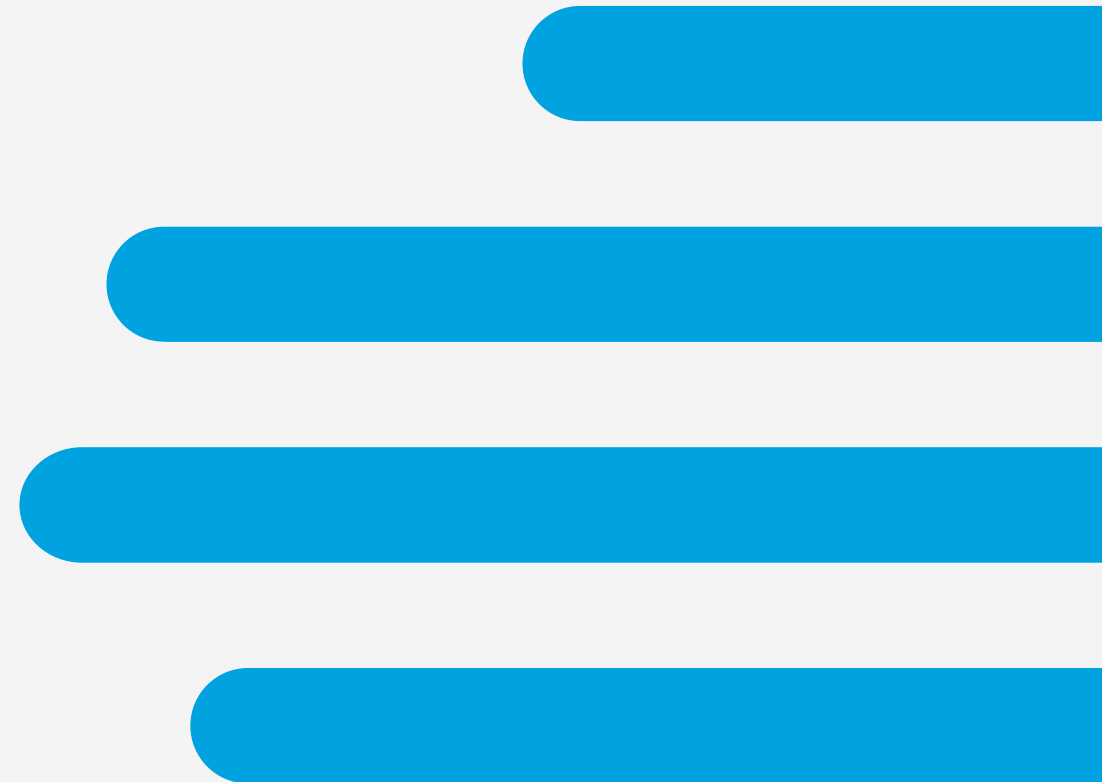


## 2021 – Top 10 Performers

Product	Company	Indication	Launch	First year sales
Wegovy <i>semaglutide</i>	Novo Nordisk	Obesity	Jun-21	\$1.3B
Prevnar 20 <i>pneumococcal vaccine</i>	Pfizer	Pneumococcal vaccine	Aug-21	\$593.4M
Qulipta <i>atogepant</i>	AbbVie	Migraine prevention	Oct-21	\$365.8M
Opzelura <i>ruxolitinib</i>	Incyte	Eczema	Oct-21	\$328.7M
Winlevi <i>clascoterone</i>	Sun Pharma	Acne vulgaris	Oct-21	\$174.2M
Lumakras <i>sotorasib</i>	Amgen	Non-small cell lung cancer	Jun-21	\$132.2M
Rezurock <i>belumosudil</i>	Kadmon	Chronic graft-versus-host-disease (GVHD)	Aug-21	\$125.6M
Scemblix <i>asciminib</i>	Novartis	Myeloid leukemia	Nov-21	\$103.1M
Nexviazyme <i>avalglucosidase alfa</i>	Genzyme	Pompe disease	Sep-21	\$100.7M
Gemtesa <i>vibregon</i>	Urovant	Overactive bladder	Apr-21	\$87.0M

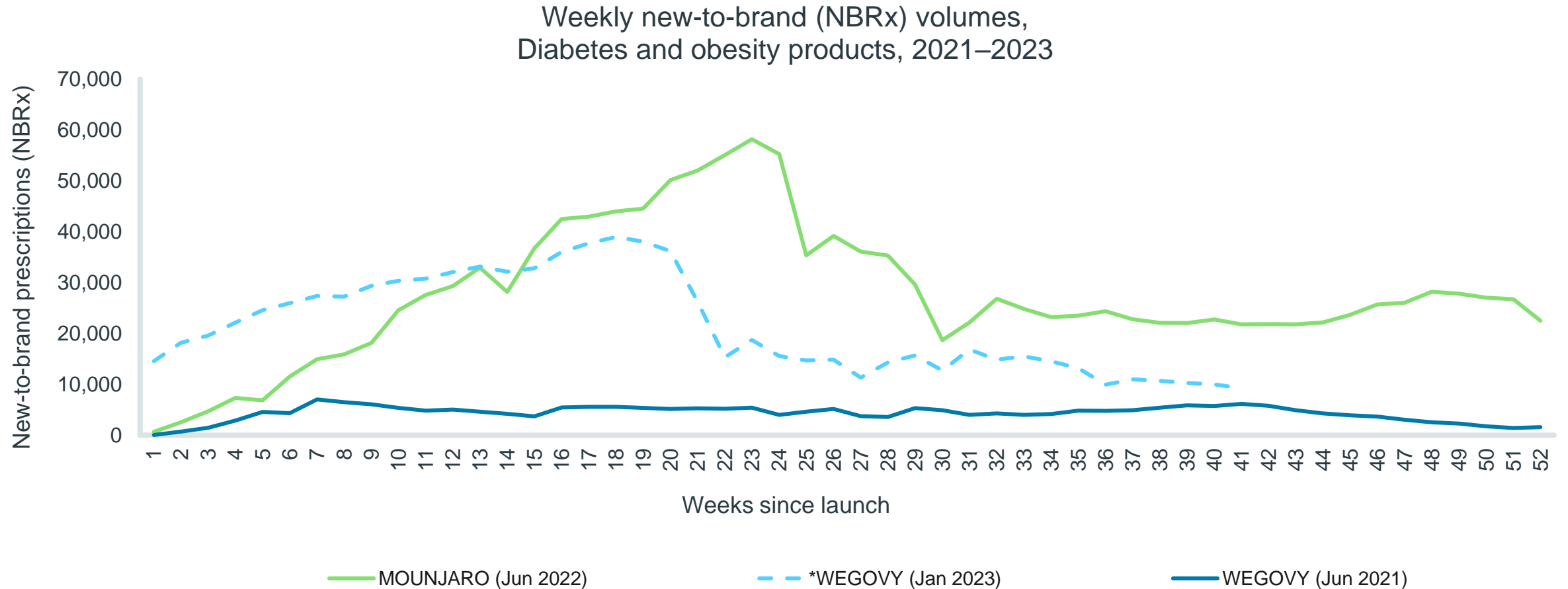
Source: National Sales Perspective; Center of Launch Excellence, IQVIA  
Notes: All sales values are USD.

## Time-aligned NBRx trends for 2021–2023 launches



# Lilly's Mounjaro (tirzepatide) continues to perform well among type 2 diabetes and/or obesity products

*The 'second launch' of Wegovy occurred after initial supply issues were resolved, though demand again outpaced production*



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

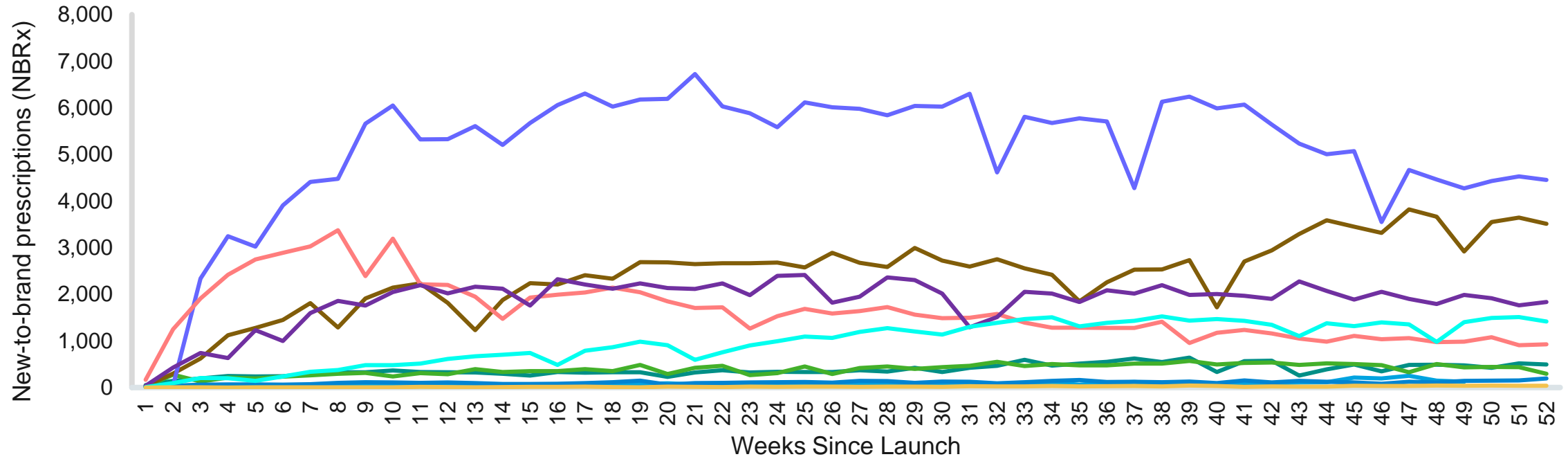
Notes: Includes products with 50% or more of sales through retail and mail channels. \*Wegovy indicates the 2023 relaunch. Wegovy is categorized as a Digestive and metabolic (non-diabetes) product, and was included for comparison purposes.



# Sun Pharmaceutical's Winlevi (clascoterone) is the top performing recent dermatology launch product

Performance of newer dermatology products (launched in 2022) is still below Winlevi and Opzelura

Weekly new-to-brand (NBRx) volumes, Dermatology products, 2021-2023



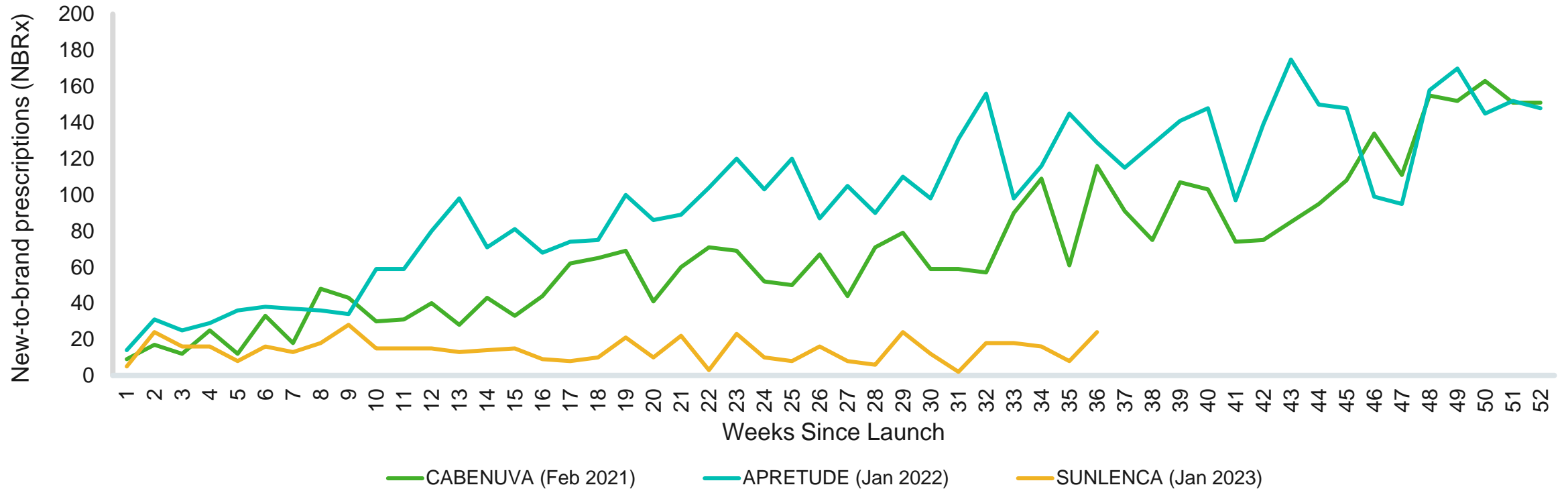
- SOTYKTU (Sep 2022)
- KLISYRI (Feb 2021)
- WYNZORA (Jul 2021)
- OPZELURA (Oct 2021)
- WINLEVI (Oct 2021)
- ADBRY (Feb 2022)
- TWYNEO (Mar 2022)
- VTAMA (May 2022)
- ZORYVE (Aug 2022)
- CIBINQO (Mar 2022)

Source: National Sales Perspective, National Prescription Audit, Patient Insights; Center of Launch Excellence, IQVIA  
 Notes: Includes products with 50% or more of sales through retail and mail channels.

# ViiV's Apretude (cabotegravir) for HIV prophylaxis (PrEP) leads the 2021–2023 infectious disease products

*ViiV's Cabenuva (cabotegravir/rilpivirine), a long-acting treatment, has performed well*

Weekly new-to-brand (NBRx) volumes, Infectious disease products, 2021-2023



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

Notes: Includes products with 50% or more of sales through retail and mail channels. Excludes Vaccine/buy-and-bill/insufficient volume: COVID vaccines (Pfizer, Moderna, JNJ), COVID treatments (Veklury, Regen-COV), Asceniv, Menquadfi