



Launch Landscape: Monthly Launch Tracker

November 2023 Edition

*Launches through November 2023
Monthly sales data through October 2023*

Issued by Launch COE on December 29th, 2023

Executive Summary

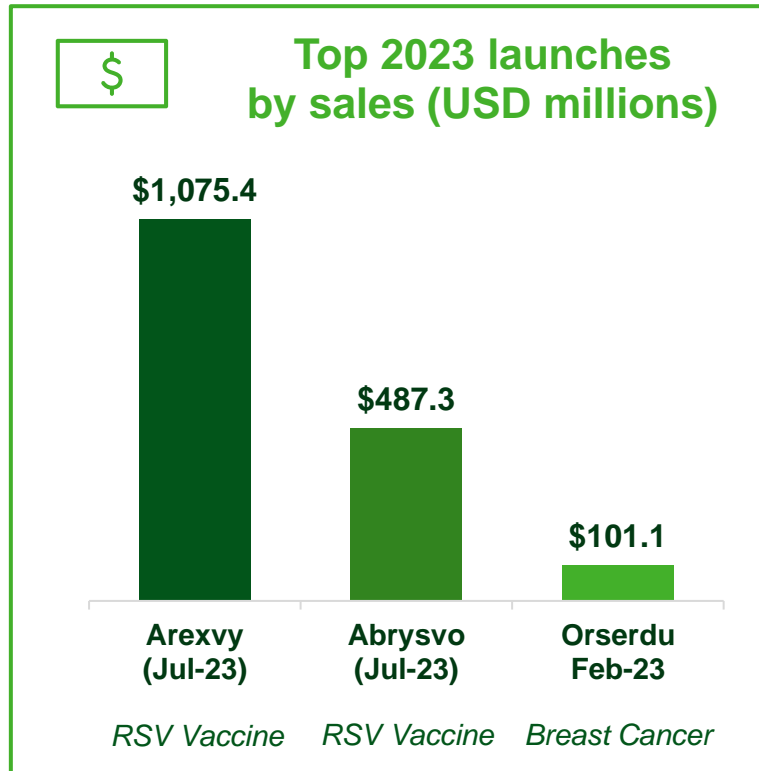



Through November 2023 there have been 64 launches, compared to 54 launches through November 2022
Immunology is the top therapy area in 2023, accounting for 32% of new product launches

64
Launches in 2023



Top therapy areas of 2023 launches

Therapy Area	Percentage
Immunology	32%
Oncology	15%
Anti-infectives	12%



49

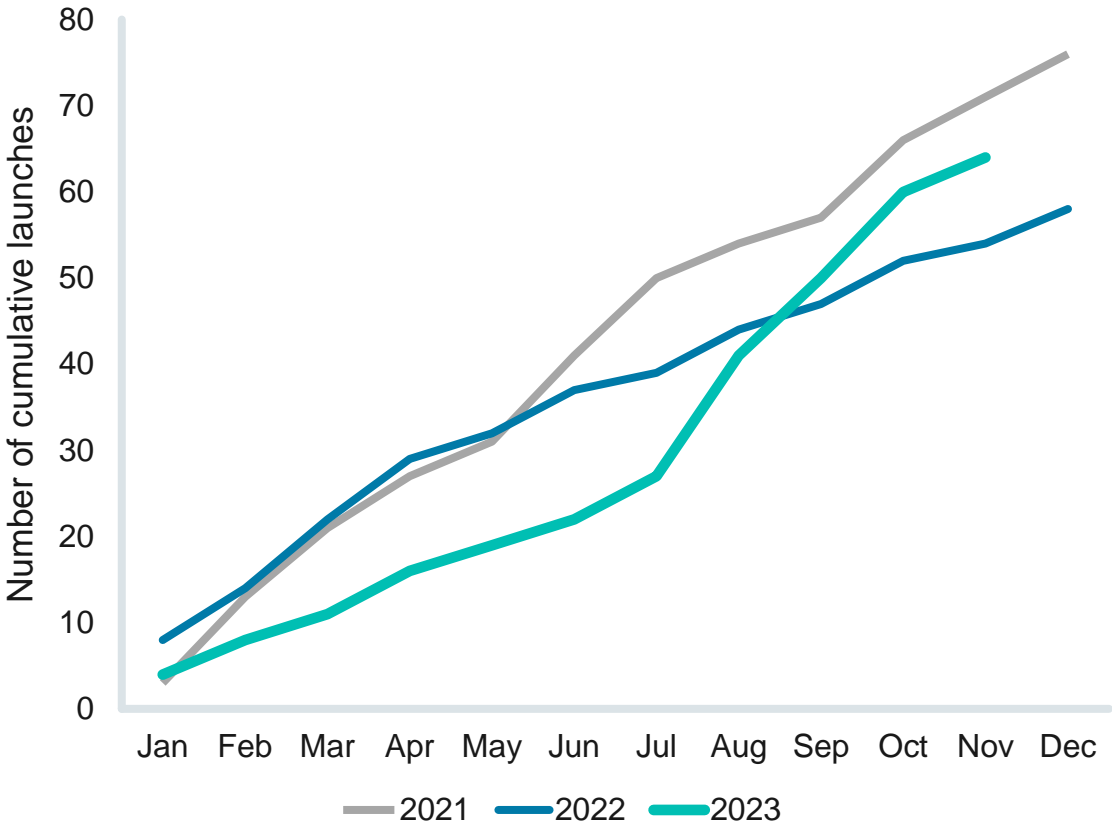


Of the 51 FDA approved New Molecular Entities (NMEs) in 2023 show evidence of launch based on supply in channel or active websites

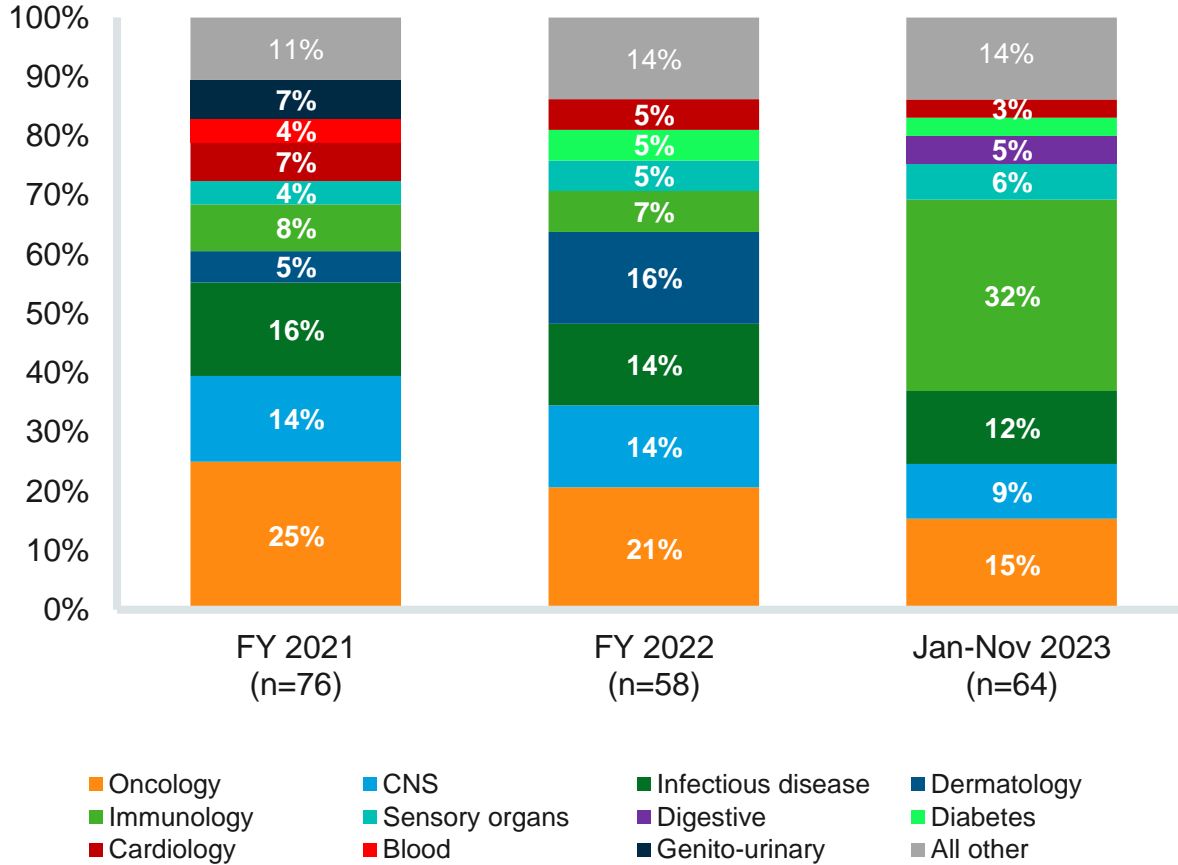
In 2022, the FDA approved 36 New Molecular Entities (NMEs). Of those 33 showed evidence of launch

The cumulative number of launches through November 2023 has surpassed 2022, and is tracking closer to 2021 over recent months

Time-aligned cumulative launches 2021–Nov 2023



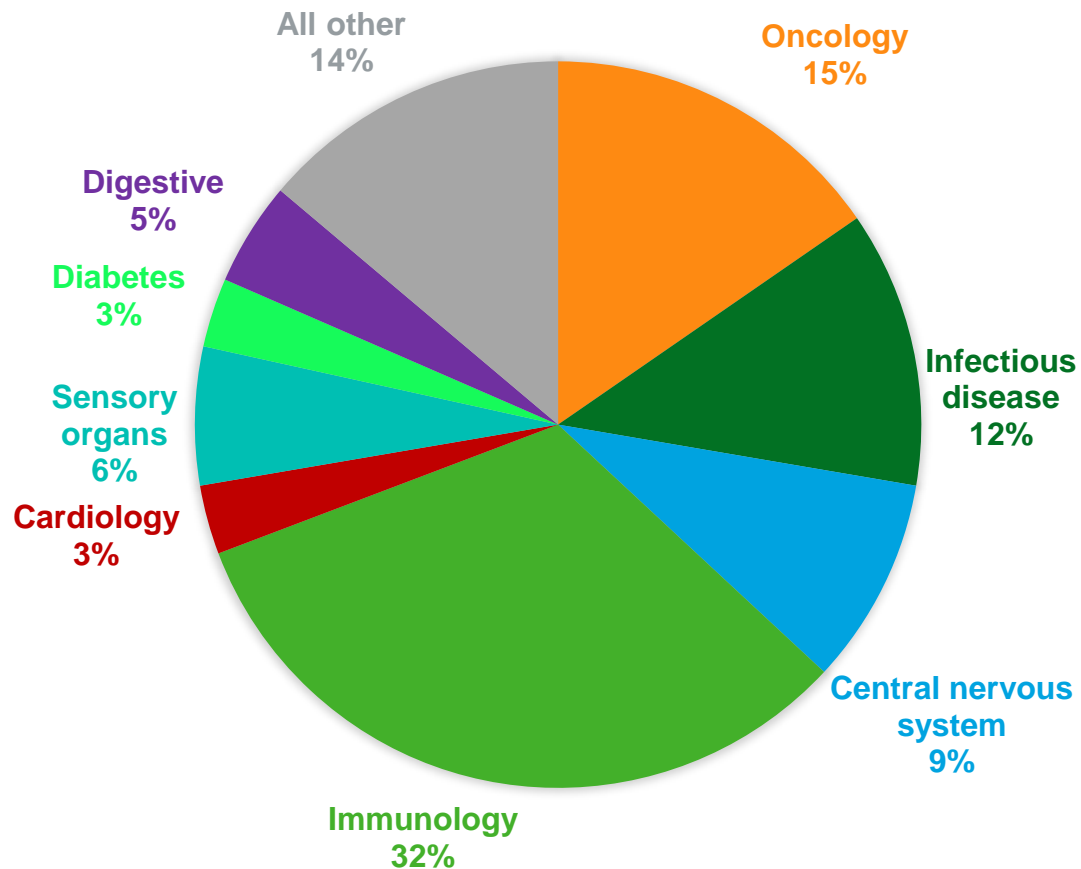
Launches by therapy area 2021–Nov 2023



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 infections due to RSV, is by far the top selling product in 2023, hitting \$1B in sales after just 4 months on the market

2023 – 64 Launches



2023 – Top 10 Performers

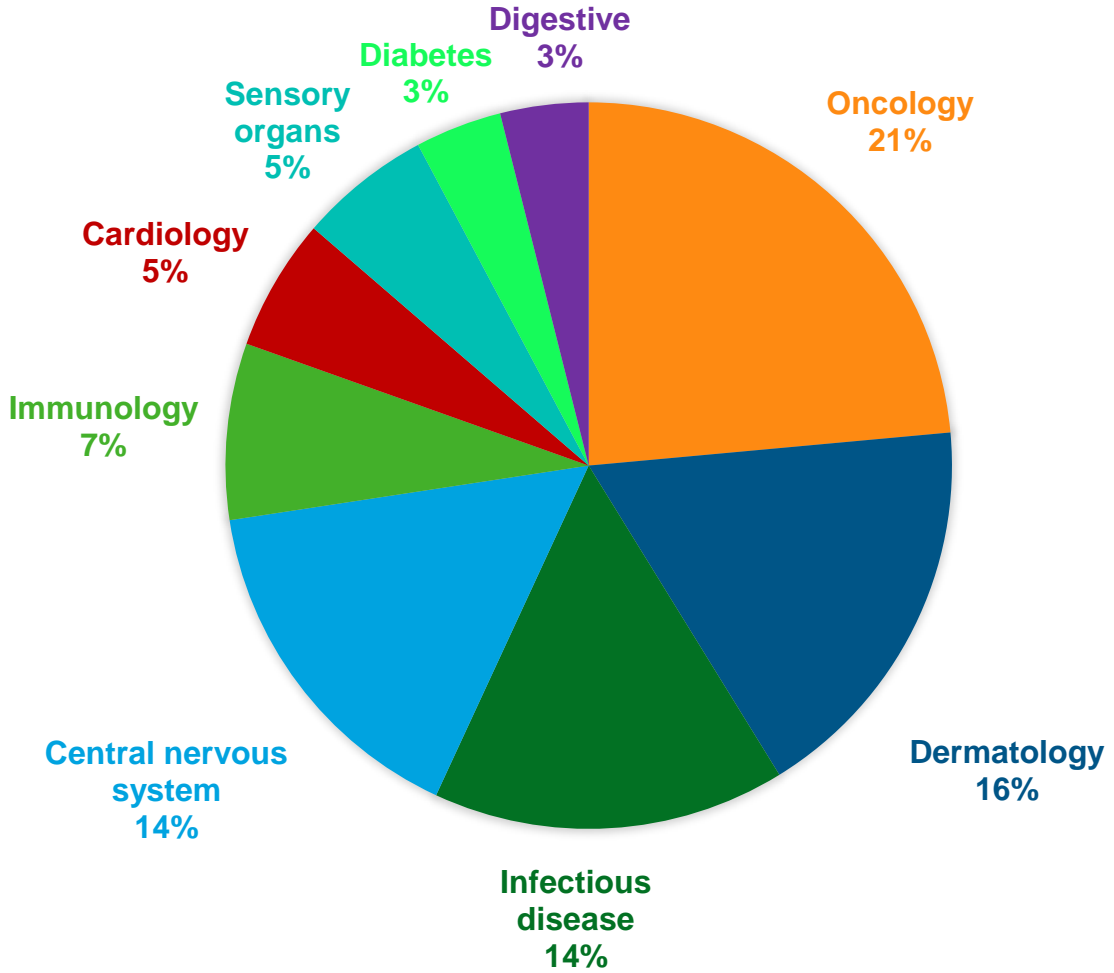
Product	Company	Indication	Launch	First year gross sales (as of Nov-23)
Arexvy <i>RSV vaccine</i>	GSK	Prevention of LRTD caused by RSV	Jul-23	\$1.08B
Abrysvo <i>RSV vaccine</i>	Pfizer	RSV vaccine	Jul-23	\$487.3M
Orserdu <i>elacestrant</i>	Stemline	Breast cancer	Feb-23	\$101.1M
Amjevita <i>adalimumab</i>	Amgen	RA, PsA, PsO, CD, UC	Feb-23	\$92.9M
Elahere <i>mirvetuximab soratansine</i>	Immunogen	Ovarian, fallopian tube and peritoneal cancer	Mar-23	\$90.7M
Beyfortus <i>nirsevimab-alip</i>	Sanofi	RSV	Sep-23	\$86.8M
Briumvi <i>ublituximab</i>	TG	Multiple sclerosis	Jan-23	\$48.2M
Jaypirca <i>pirtobrutinib</i>	Eli Lilly	Mantle cell lymphoma	Feb-23	\$45.8M
Elevidys <i>delandistrogene moxeparovec-rokl</i>	Sarepta	Duchene muscular dystrophy (DMD) in adolescents	Sep-23	\$39.5M
Lunsumio <i>mosunetuzumab</i>	Genentech	Follicular lymphoma	Jan-23	\$38.2M

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



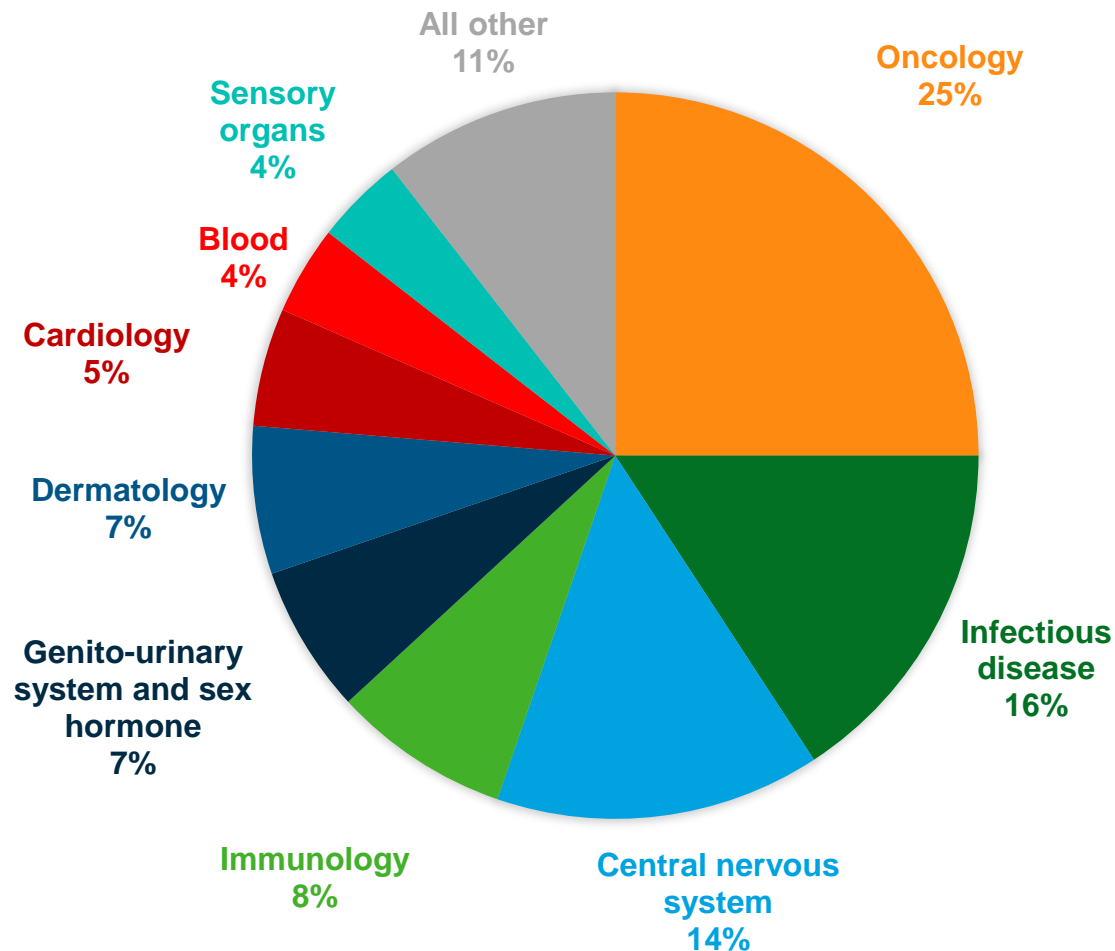
2022 – Top 10 Performers

Product	Company	Indication	Launch	First year gross sales
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
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; 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

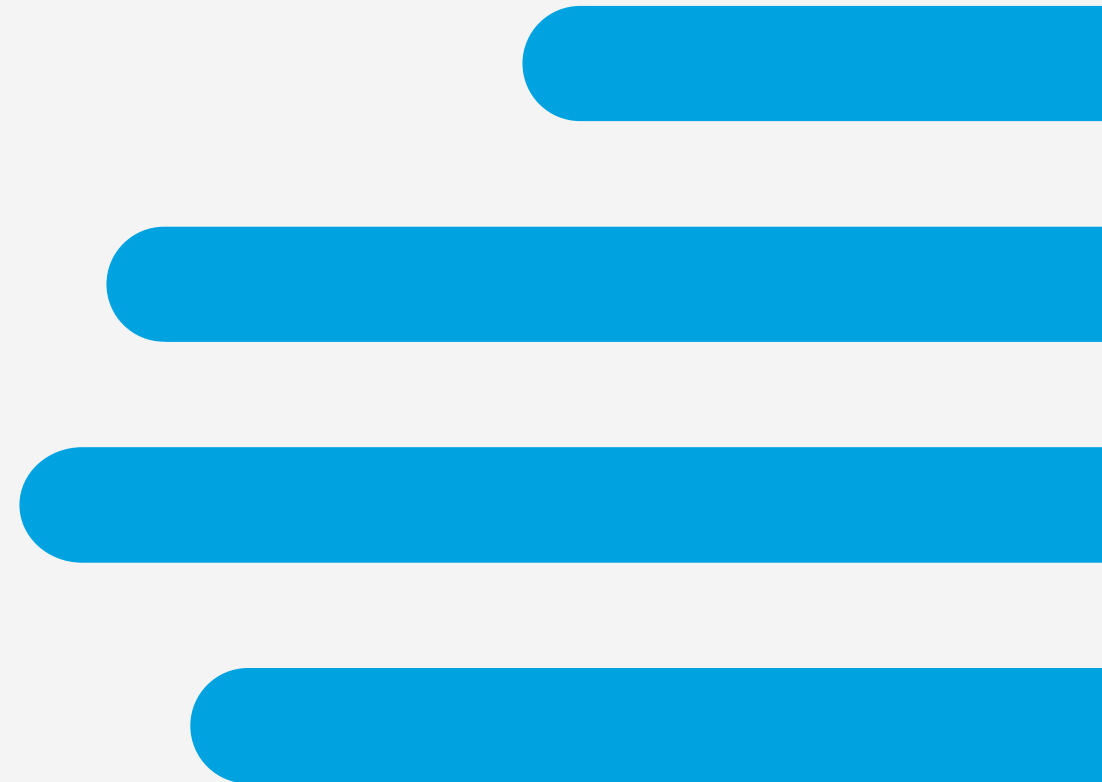


2021 – Top 10 Performers

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.

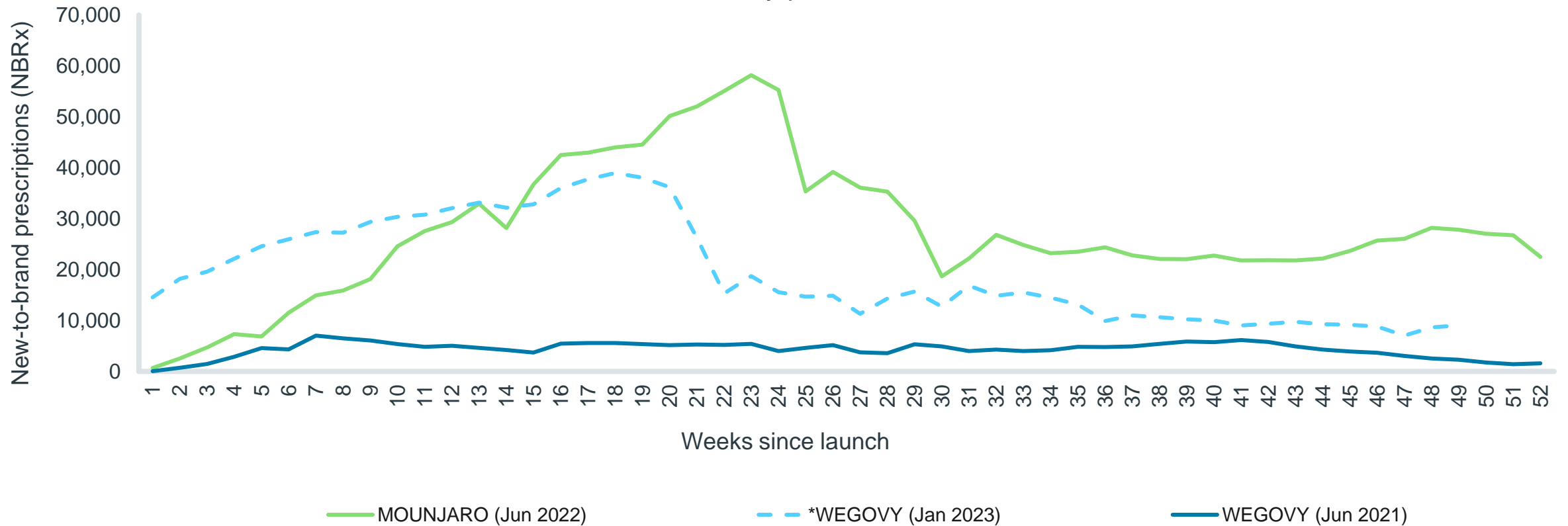
Time-aligned NBRx trends for 2021–2023 launches



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

Weekly new-to-brand (NBRx) volumes,
Diabetes and obesity products, 2021–2023



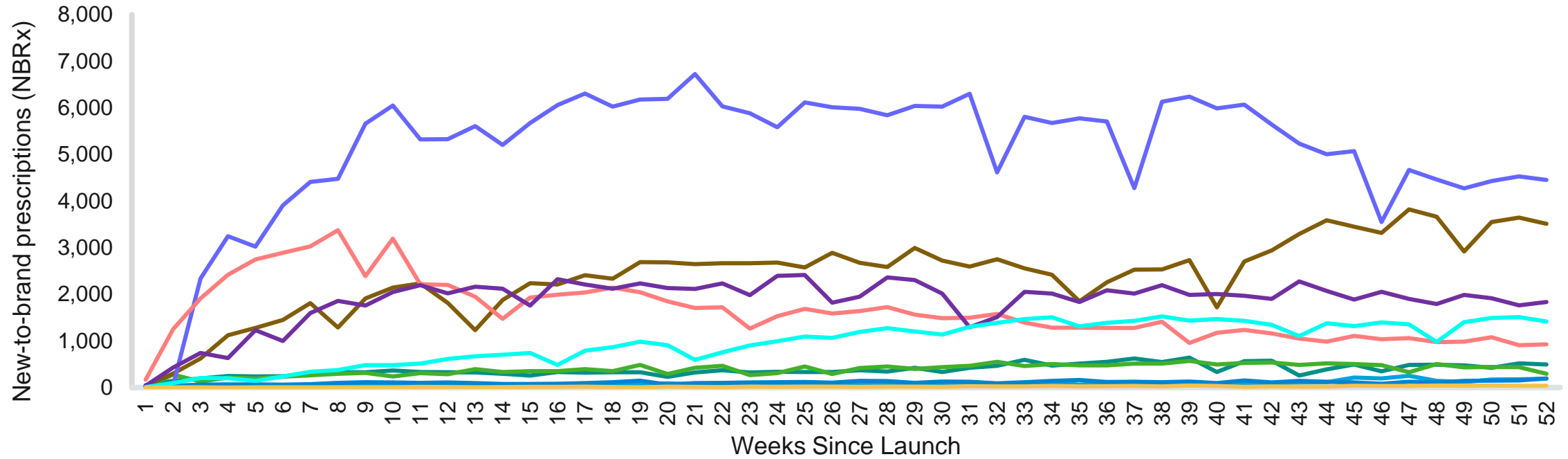
Source: National Sales Perspective, National Prescription Audit, Patient Insights; Center of Launch Excellence, IQVIA

Notes: Includes products with 50% or more of sales through retail and mail channels. *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 recently launched dermatology 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



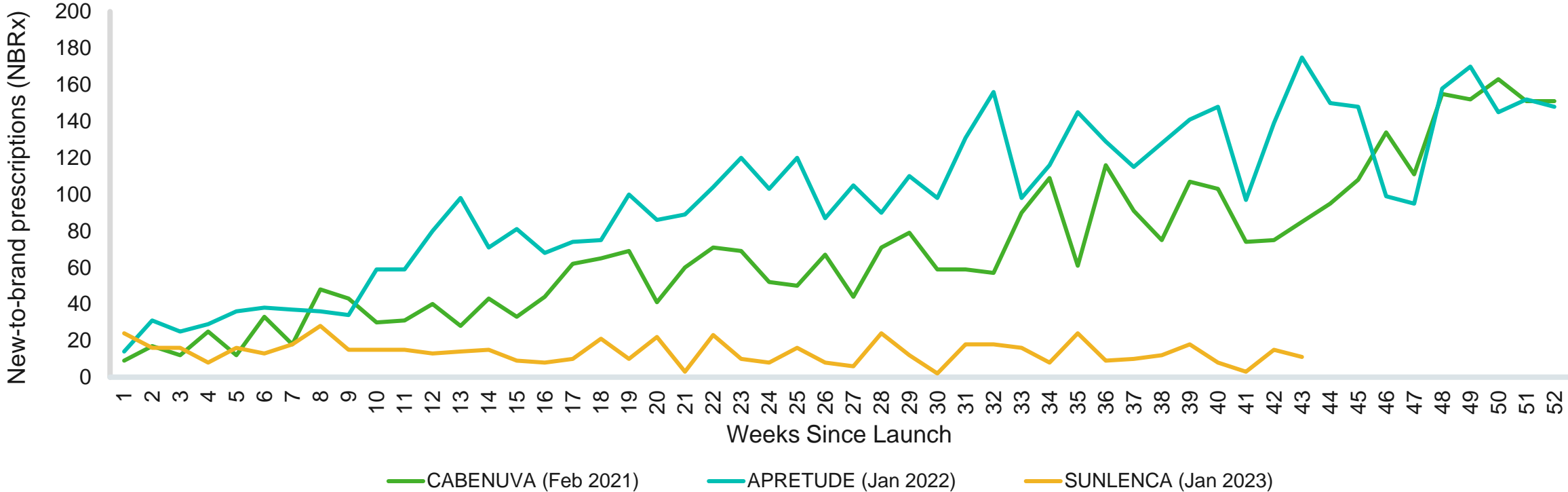
- SOTYKTU (Sep 2022)
- ADBRY (Feb 2022)
- KLISYRI (Feb 2021)
- TWYNEO (Mar 2022)
- WYNZORA (Jul 2021)
- VTAMA (May 2022)
- OPZELURA (Oct 2021)
- ZORYVE (Aug 2022)
- CIBINQO (Mar 2022)
- WINLEVI (Oct 2021)

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