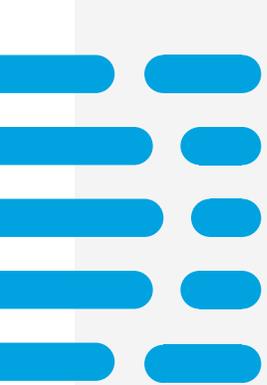




# US Generics & Biosimilars Trends, Issues & Outlook for AAM

*Presented by:  
Doug Long, VP, Industry Relations*

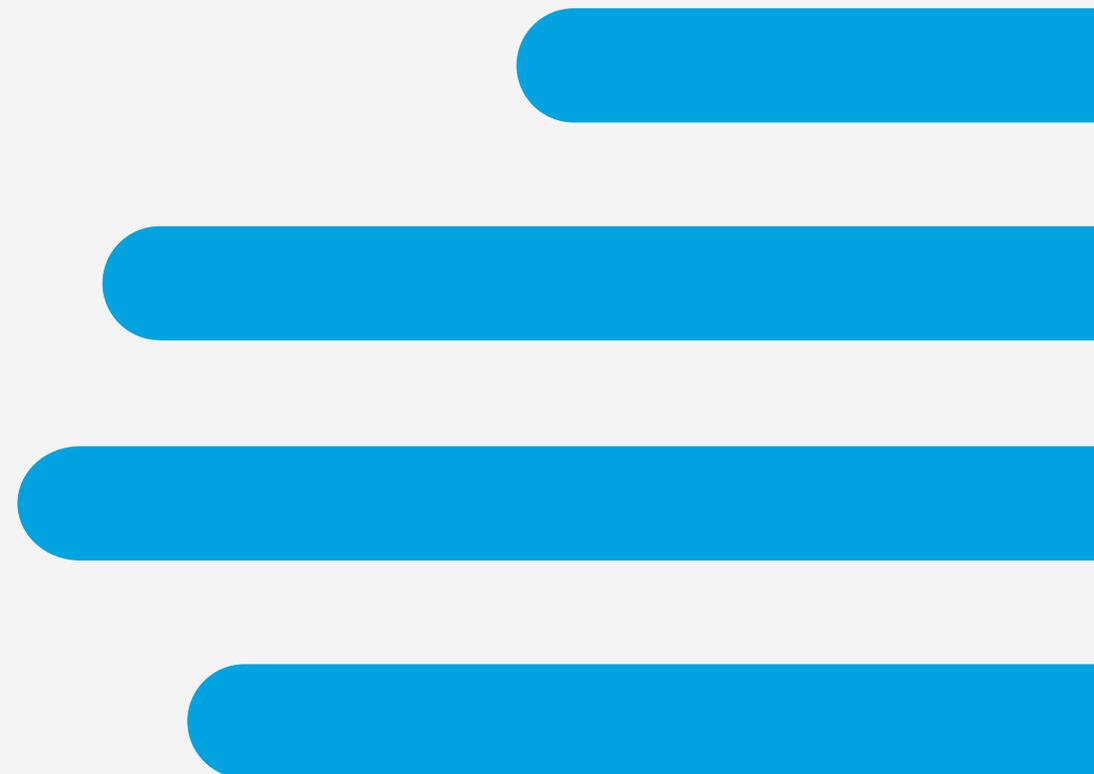
*February 14, 2023*



# Agenda

- + COVID, Flu, RSV, Colds, Etc.
- + Market Trends: Utilization
- + Where are we now?
- + Generics and Biosimilars
- + Outlook

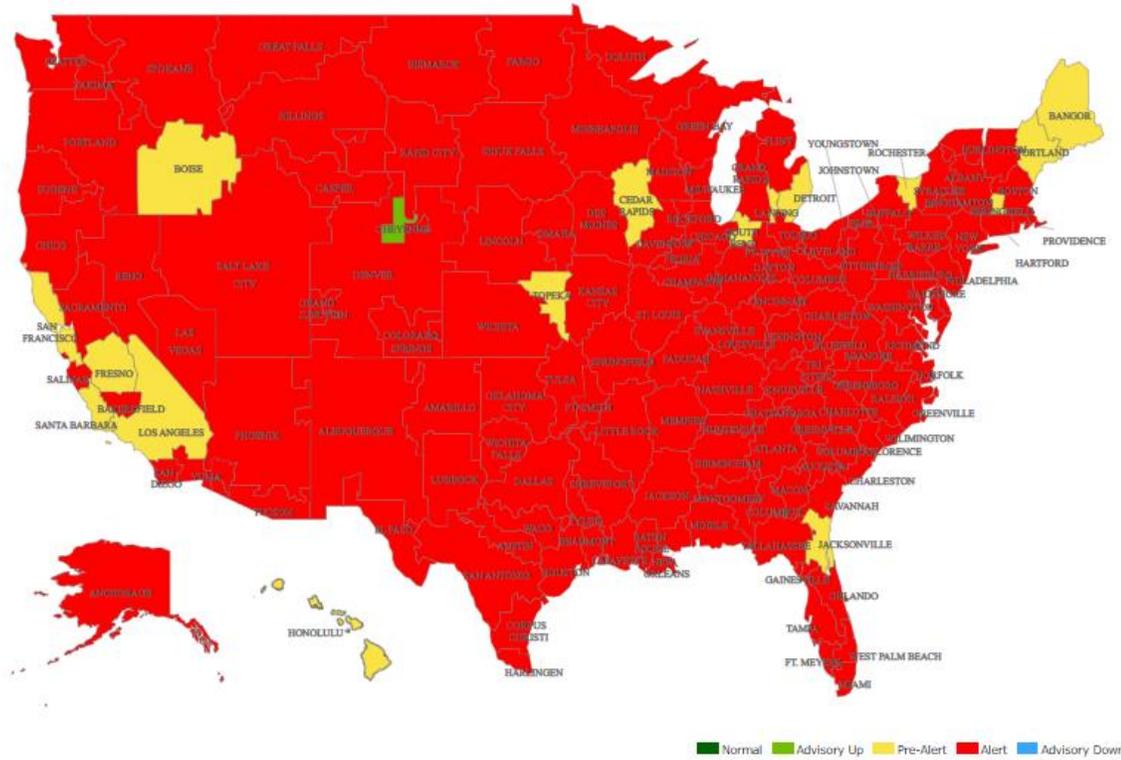
**COVID, Flu, RSV, Colds,  
Etc.**



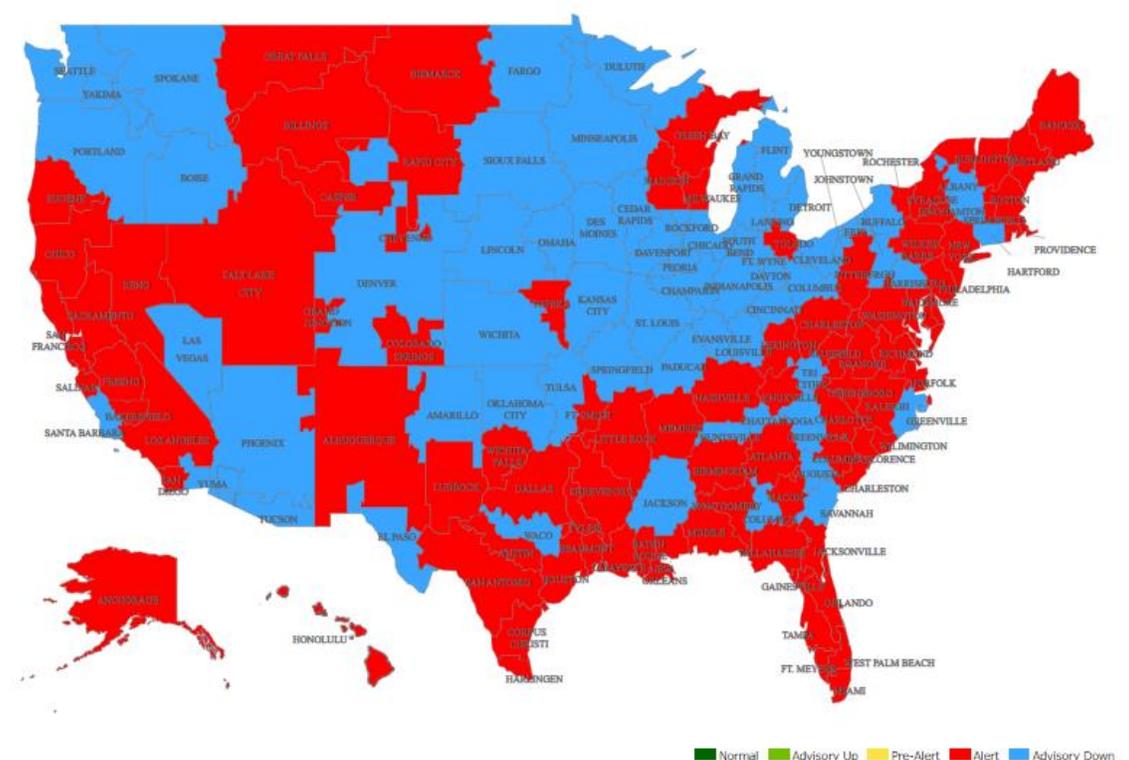


# FAN<sup>®</sup> reports reflect that much of the country is in “Advisory Down” status, a much different picture than this time last year

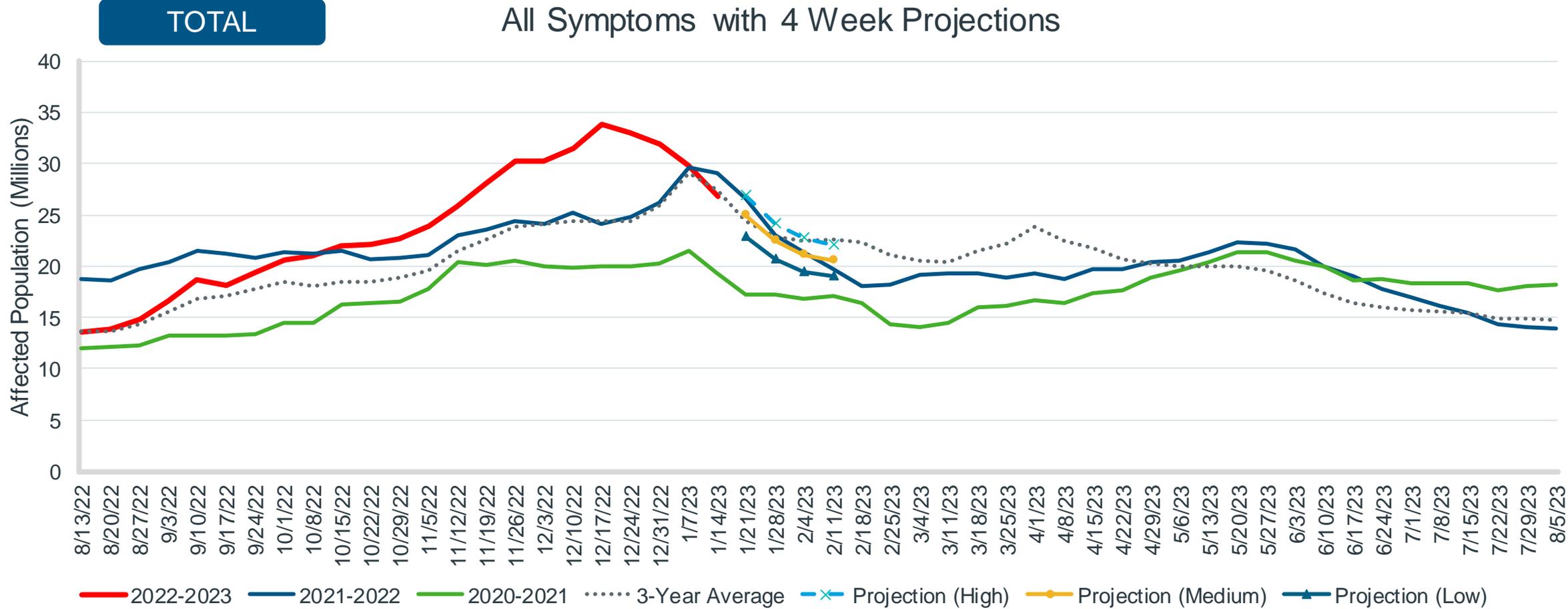
Last Season – Week-ending 1/14/22



Current Season – Week-ending 1/14/22

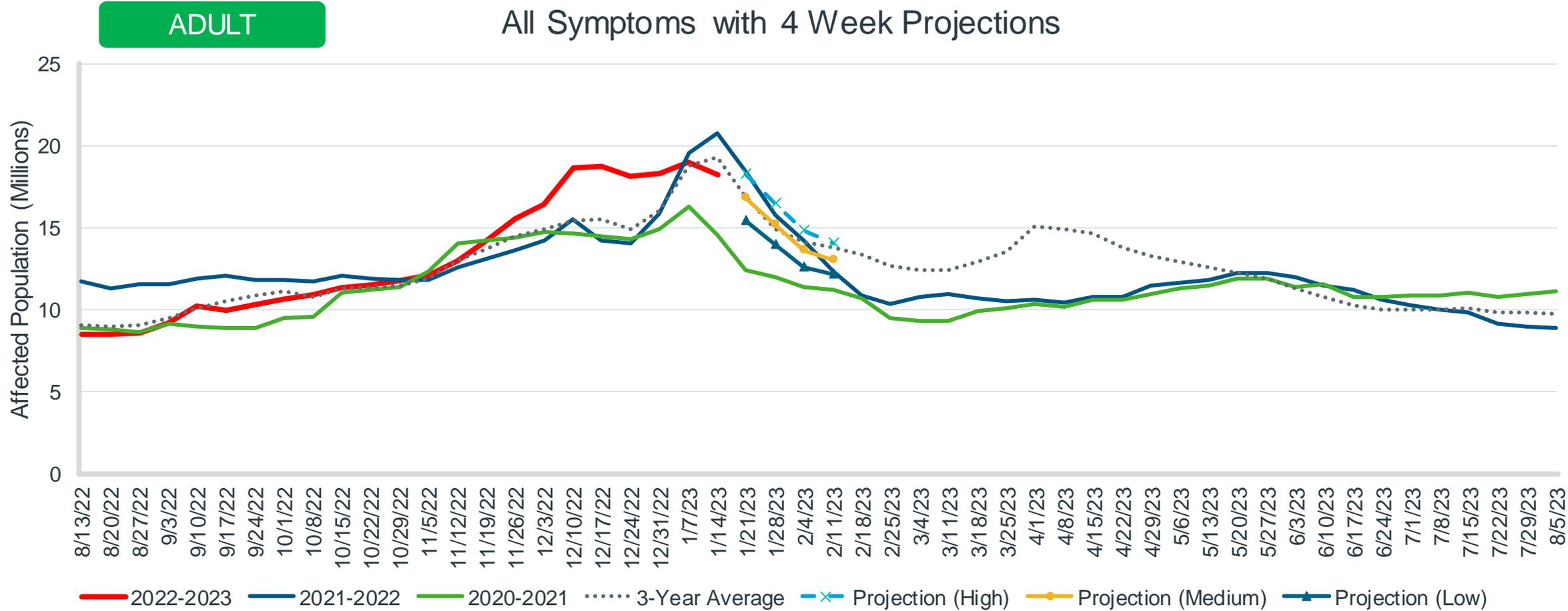


# All symptoms run above historical trends and projections anticipate declines



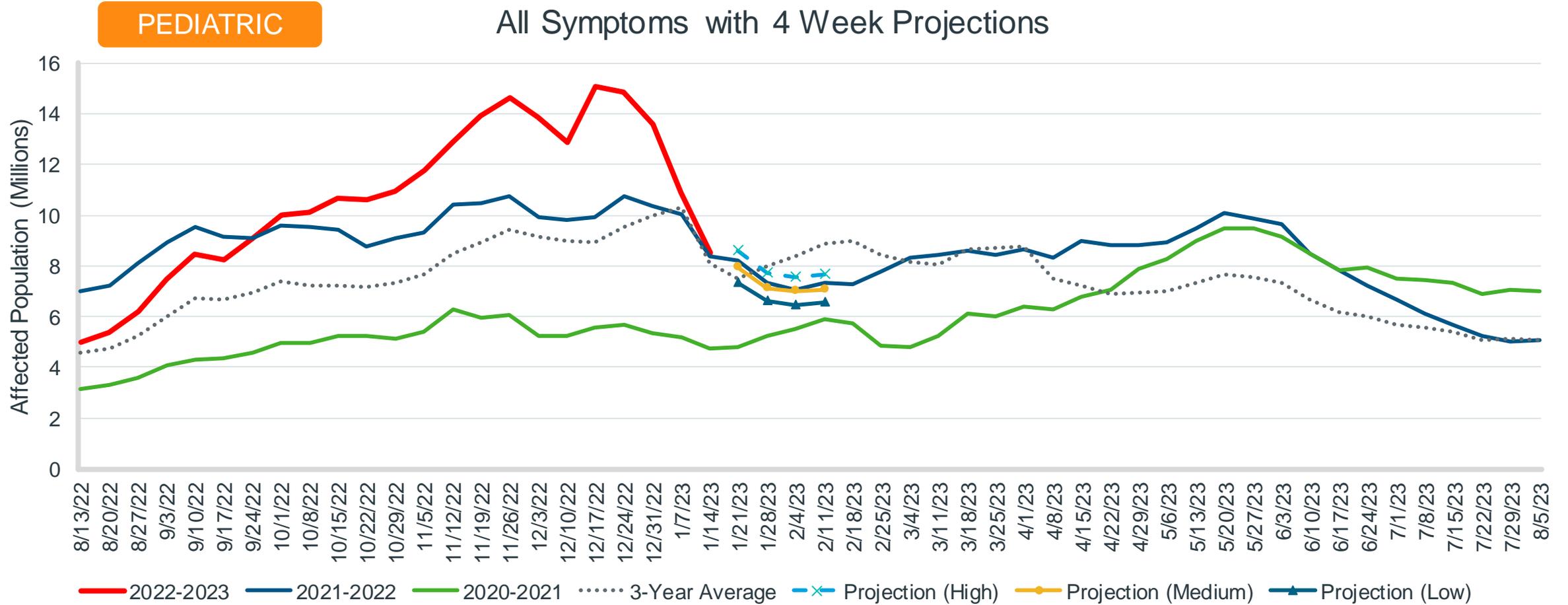
Updated through January 14, 2023

# Adults ran above historical trends but are in decline



Updated through January 14, 2023

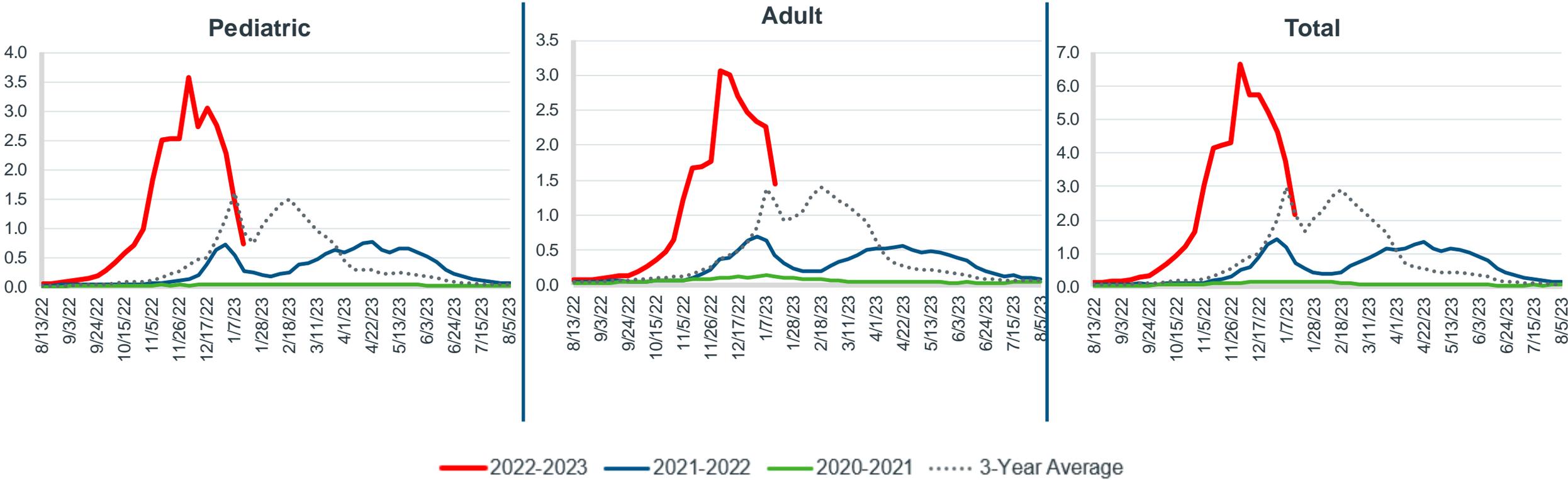
# Pediatrics numbers are decreasing



Updated through December 31, 2022

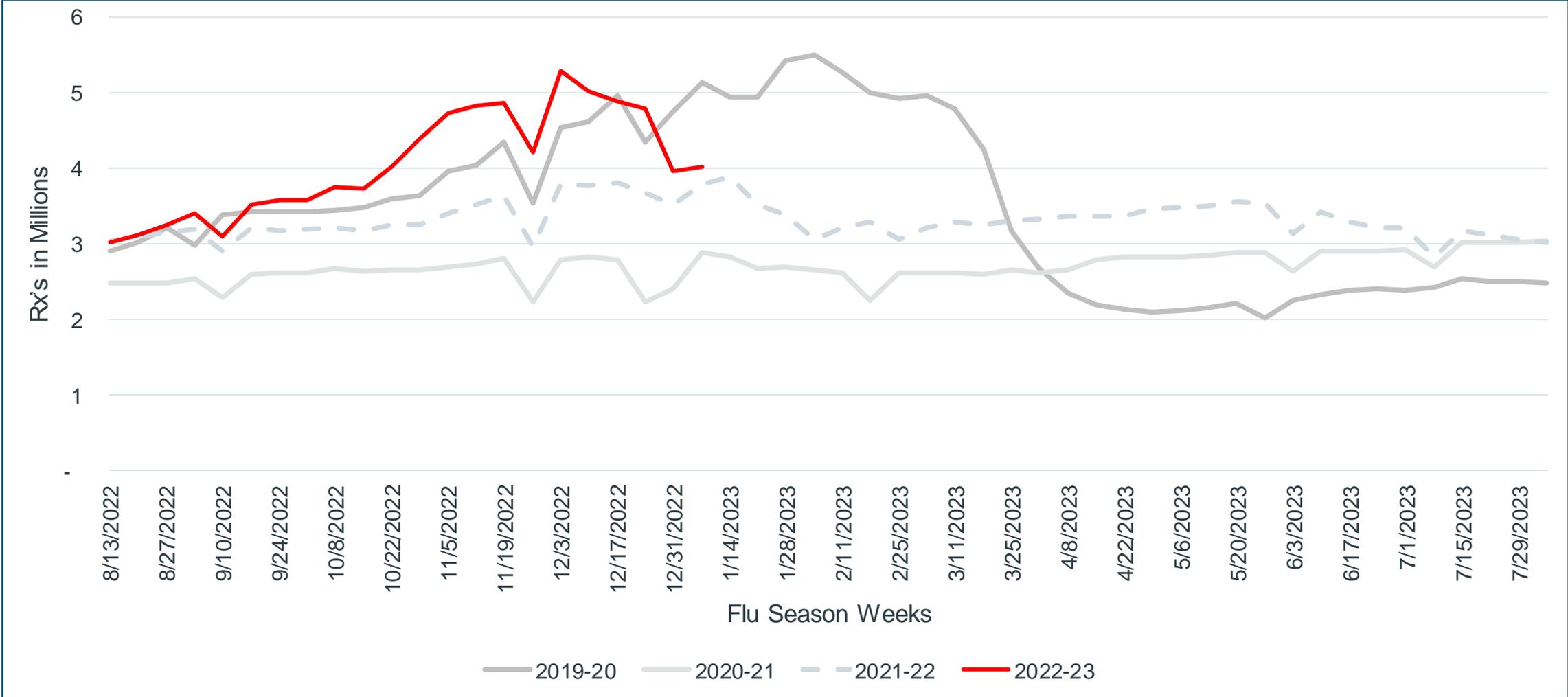
# ILI: Cases peaked in early December 2022 but are declining rapidly

ILI (Influenza Like Illness - Affected Population in Millions)



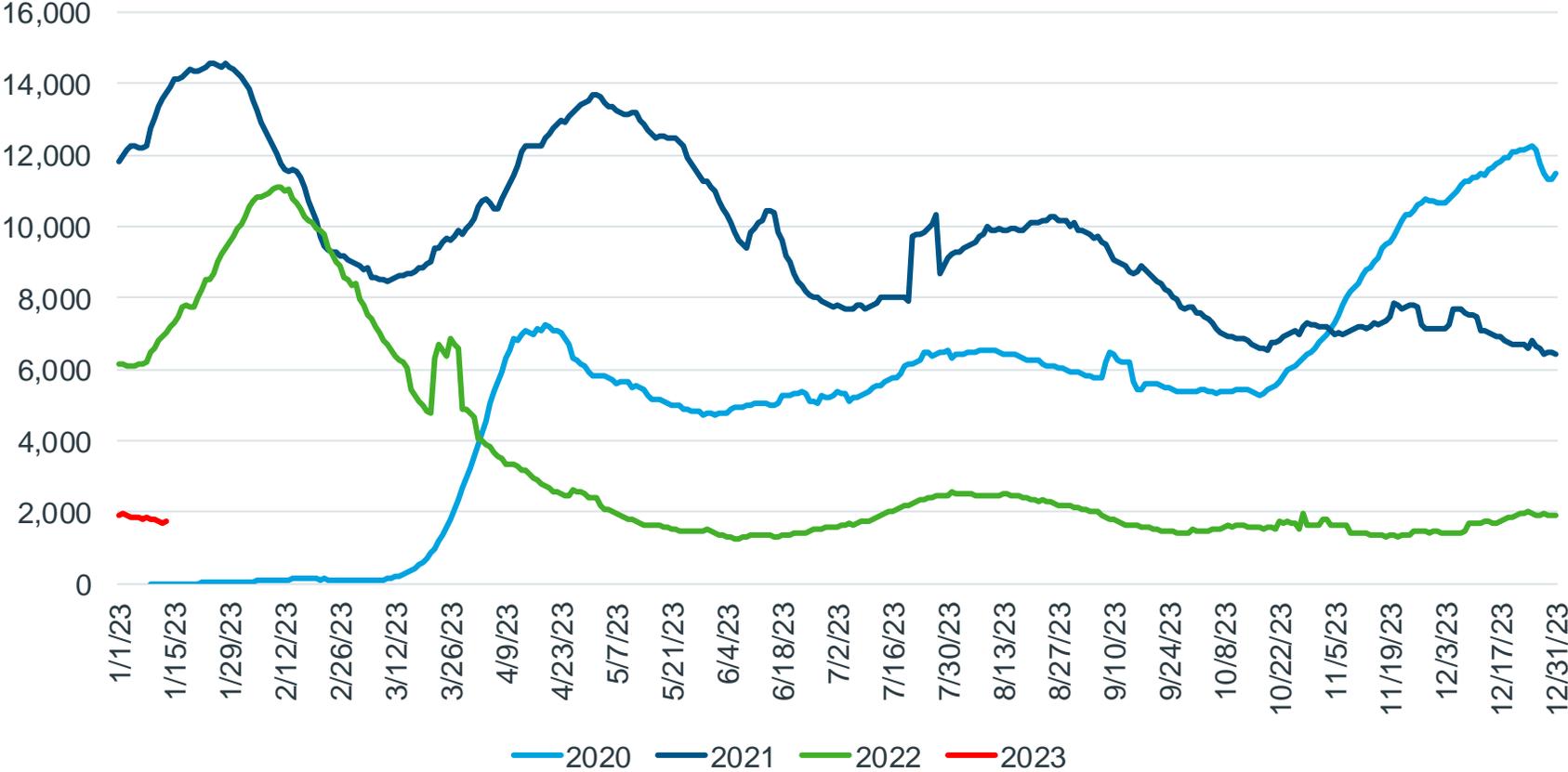
Updated through January 14, 2023

# Cough, Cold and Flu Rx's are slowing as symptoms are slowing



# According to the WHO, global deaths continue to decline

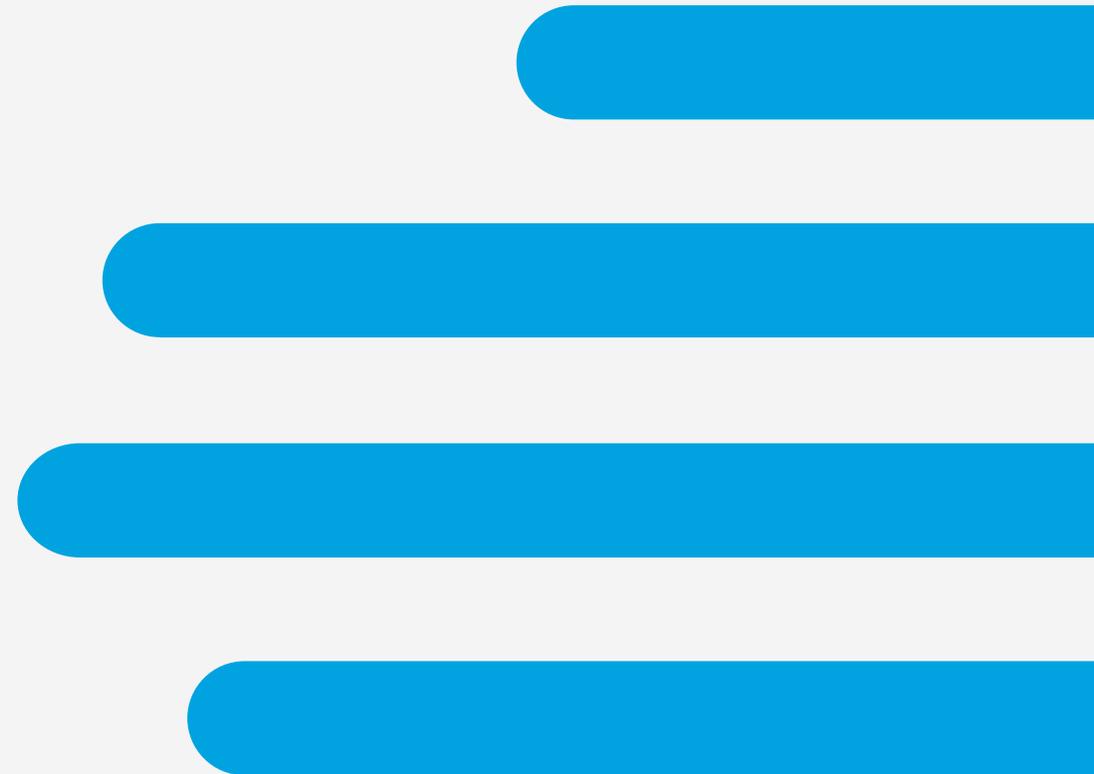
## WHO Global 7 Day Moving Average - Deaths



Data Source: <https://covid19.who.int/WHO-COVID-19-global-data.csv>, updated through 1/13/23

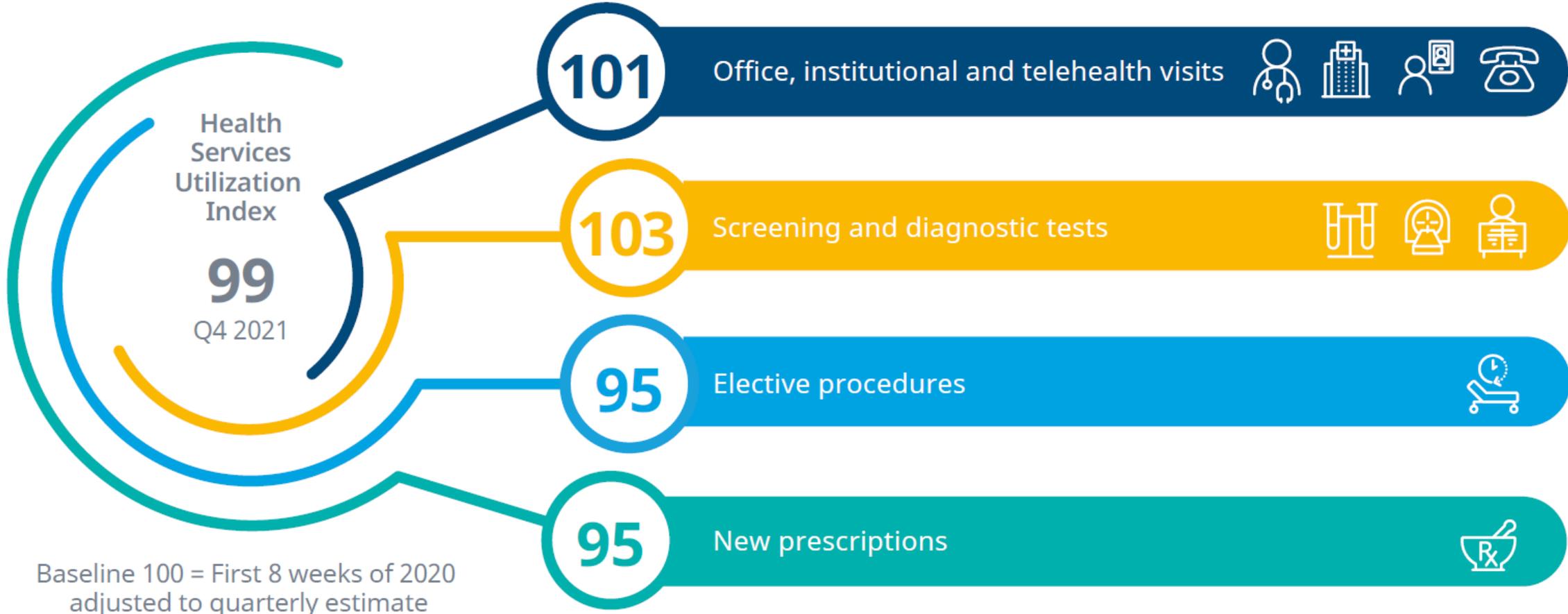
# Market Trends: Utilization

*Medical claims/activity*



# The Health Services Utilization Index indicates the U.S. is operating at nearly pre-COVID-19 levels

Overview of Health Services Utilization Index

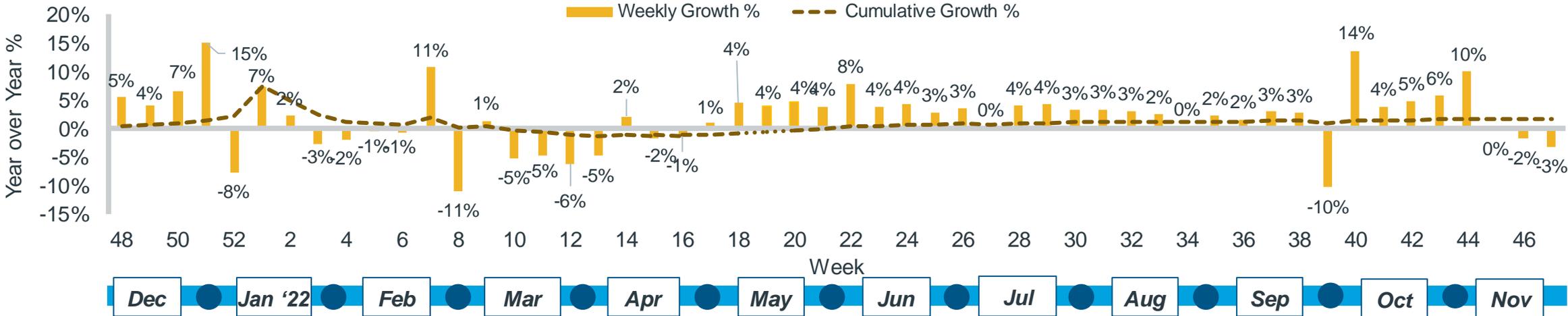


Source: IQVIA Institute; IQVIA Medical Claims Data; LAAD Prescription data, week ending 12/31/2021. The Use of Medicines in the U.S.: Usage and Spending Trends and Outlook to 2026. Report by the IQVIA Institute for Human Data Science.

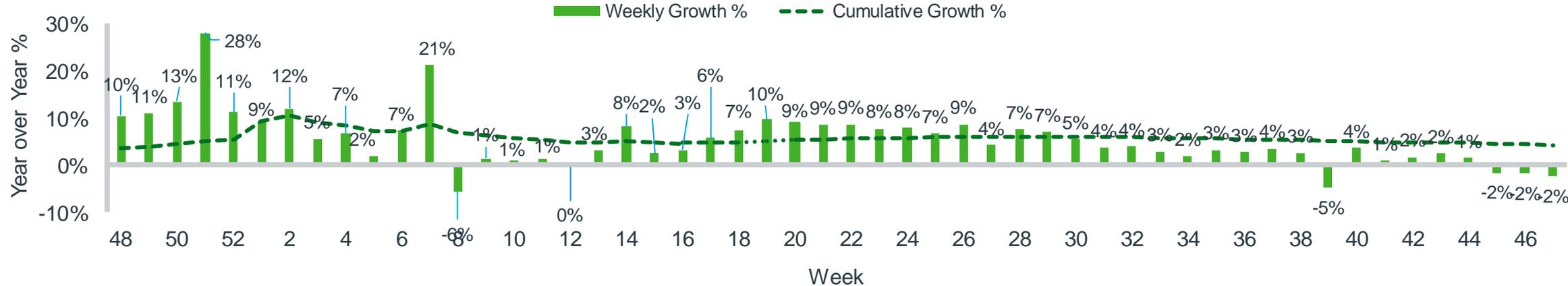
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# Cumulative institutional claim trend is flat in 2022 compared to 2021, while office claims increase over 2021

Year over Year Growth\* – Institutional Claims Across Time Aligned Weeks



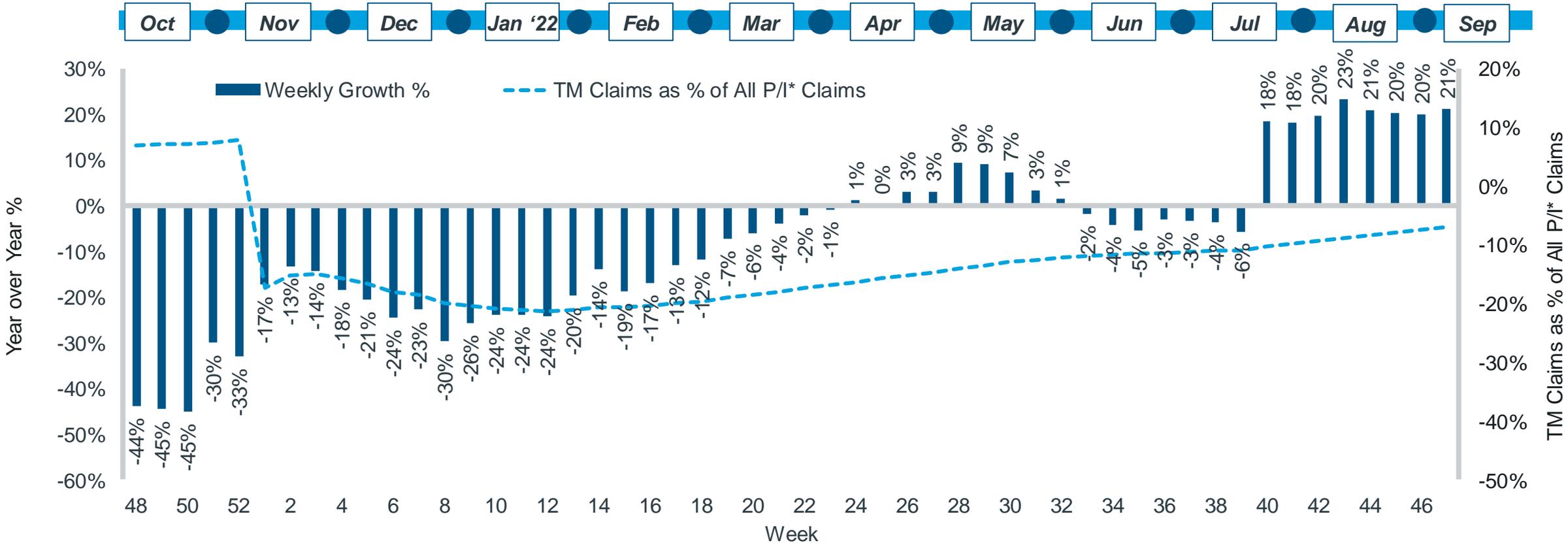
Year over Year Growth\* – Office Claims Across Time Aligned Weeks



Source: IQVIA: Medical Claims Data Analysis, 2022  
 Notes: Week 52 2021 = 12/31/2021; Week 47 2022 = 11/25/2022

# After a dramatic entrance, telemedicine use slows overall, though a slight increase in usage in Nov 2022 compared to Nov 2021

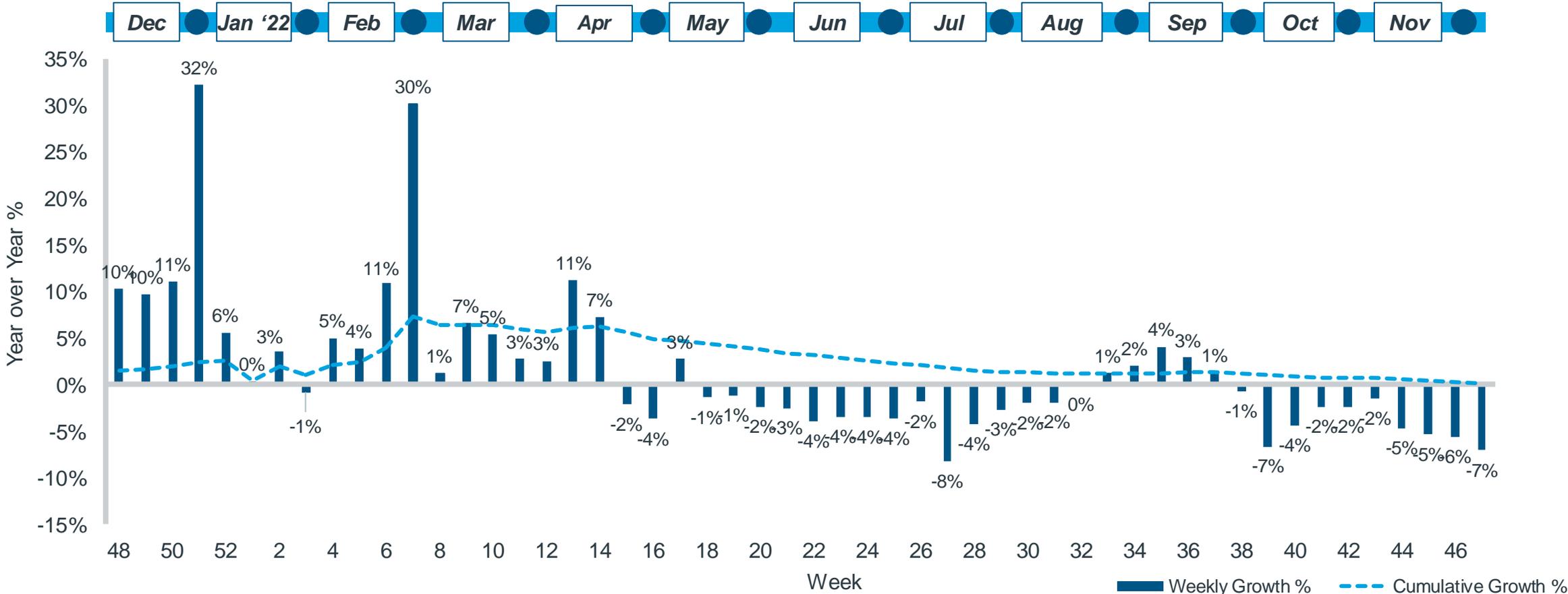
*Slight increases in telemedicine visits occurs in August and November 2022*



Source: IQVIA: Medical Claims Data Analysis, 2022  
 Week 47 2022 = 11/25/2022; Week 52 2021 = 12/31/2021  
 \*All P/I Claims total indicates Telemedicine, Office, and Institutional claims

# Elective procedures in 2022 are declining in recent weeks, but cumulatively 2022 is flat compared to 2021

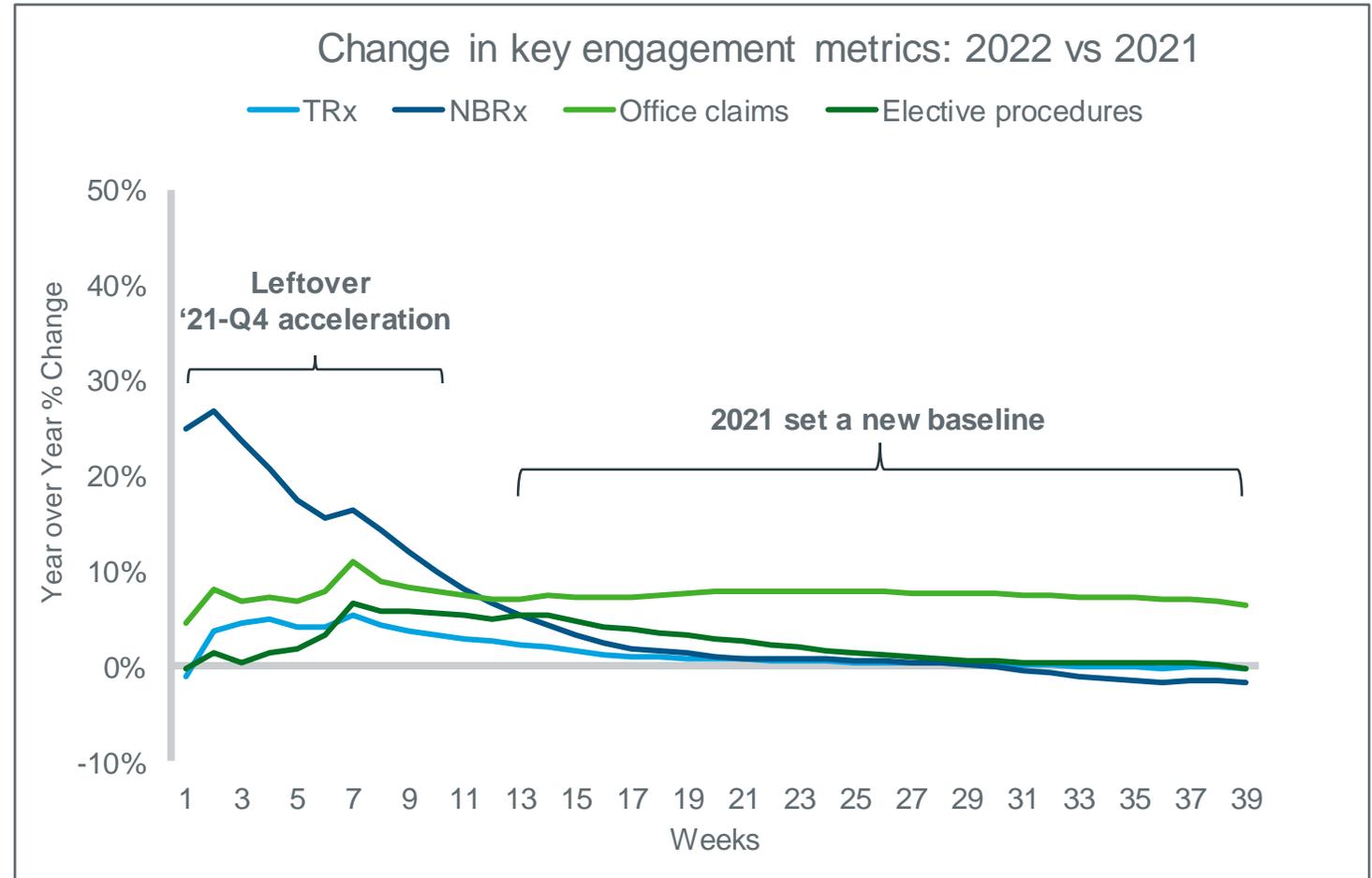
Year over Year Growth – Elective Procedure Across Time Aligned Weeks



Source: IQVIA: Medical Claims Data Analysis, 2022  
 Notes: Week 47 2022 = 11/25/2022; Week 52 2021 = 12/31/2021; Elective procedures based on IQVIA custom analysis; Data includes claims from inpatient and outpatient sites of care. Trend break occurs at the beginning of 2022 as the cumulative calculations are performed on the beginning of the year period.

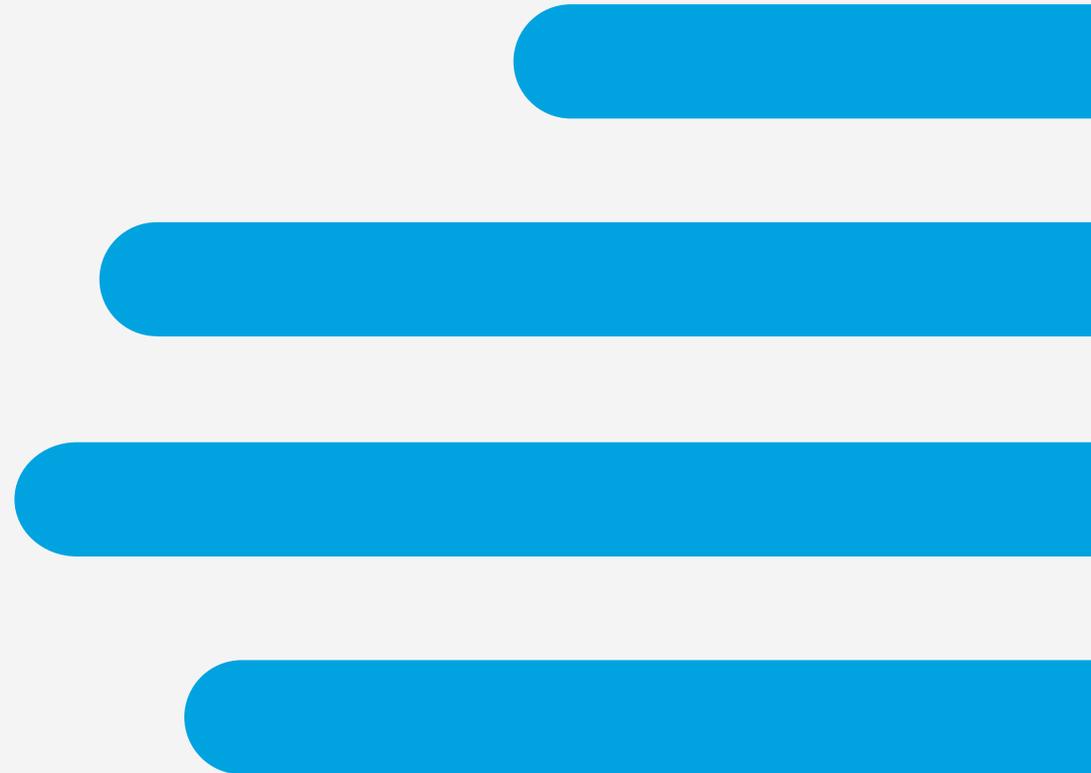
# Reluctant patient engagement signals space for change

*Economic factors can impact choice to seek care, but a new normal has arrived*



[Here's the inflation breakdown for December 2022—in one chart \(cnbc.com\)](#); Source: National Prescription Audit (NPA); Medical claims data, IQVIA  
 Notes: Channel prescriptions not normalized for Rx size. Week 39 2022 = 09/30/2022; Week 39 2021 = 10/01/2022; Health services: 5Deals 2022 midyear outlook: PwC; [The Economics Daily: U.S. Bureau of Labor Statistics \(bls.gov\)](#)

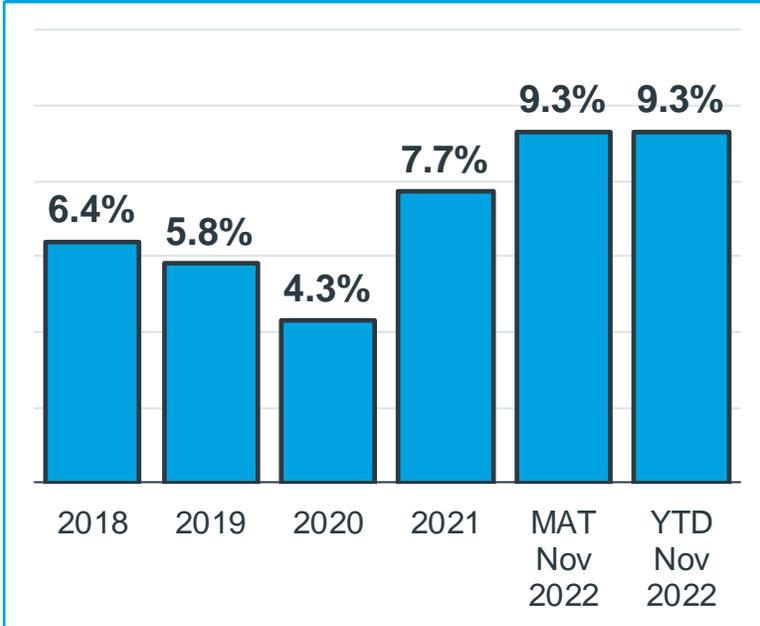
# Where Are We Now?



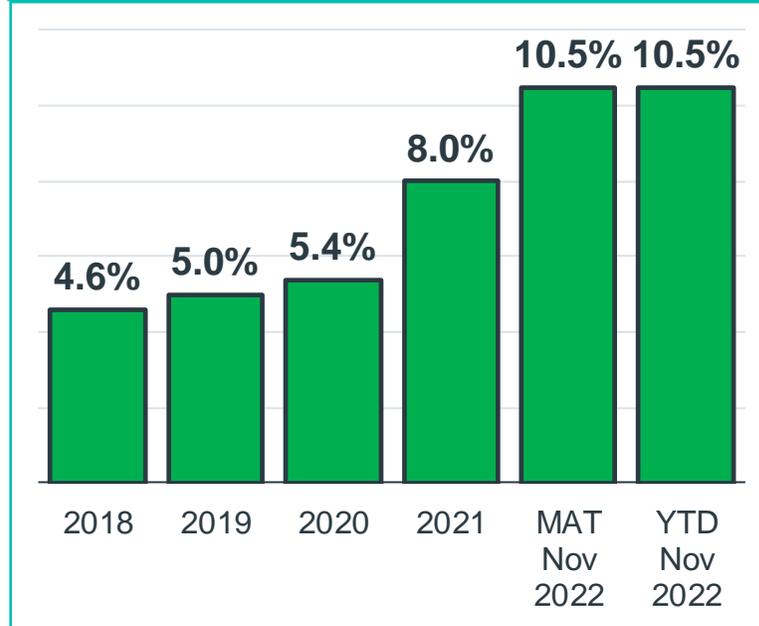
# The Non-Retail channel is recovering from effects of COVID-19

## Growth (%) of Sales

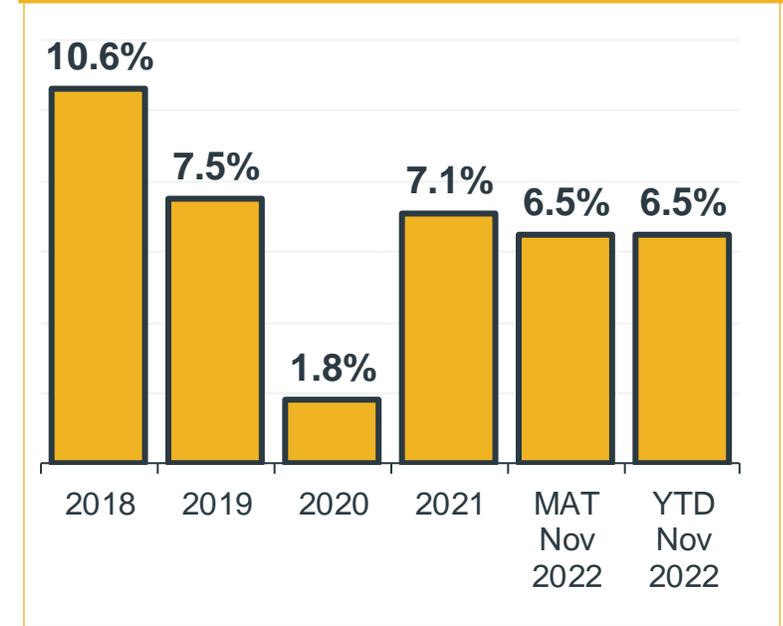
Total Market (Retail, Non-Retail and Mail)



Retail and Mail

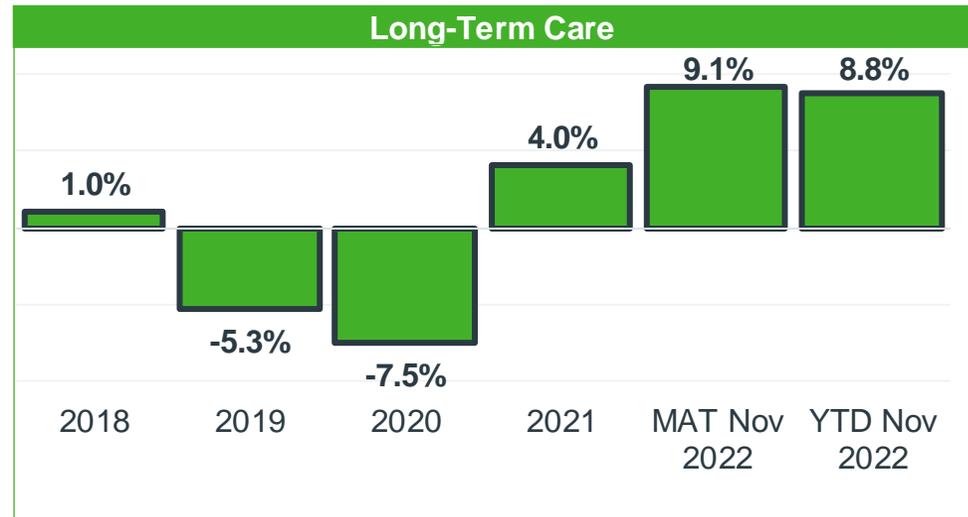
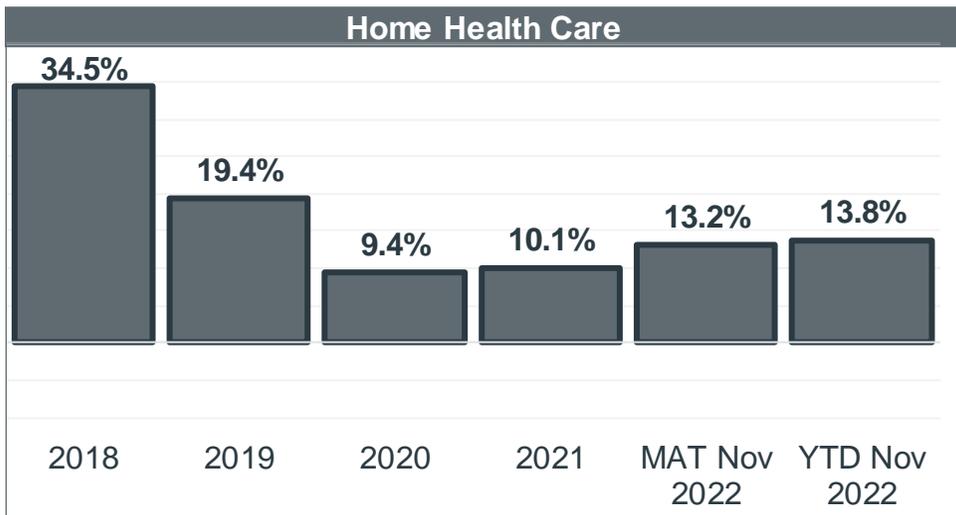
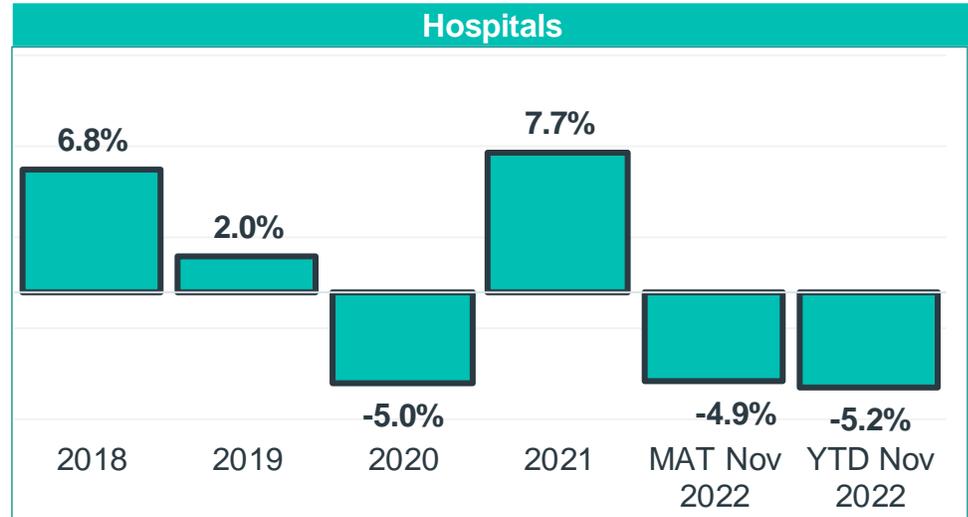
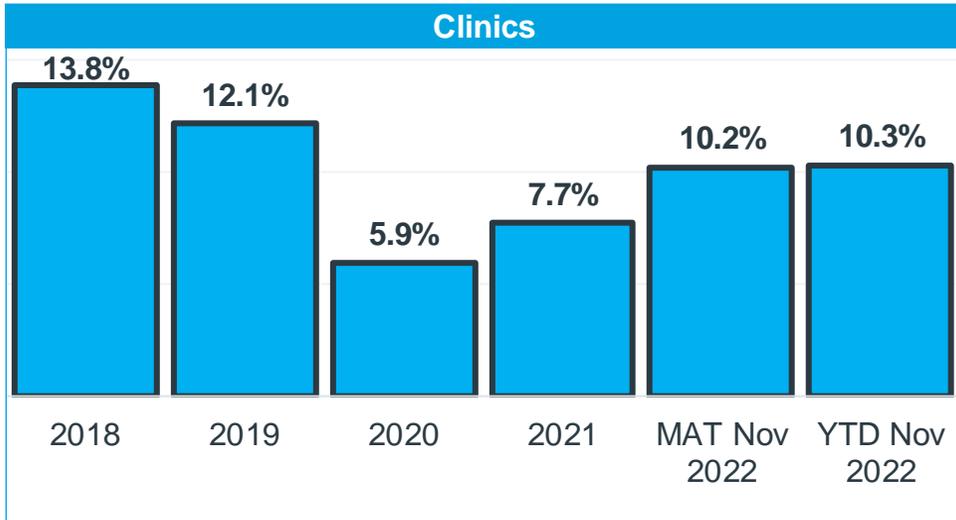


Non-Retail



# COVID-19 has affected Hospital sales more than other Non-Retail

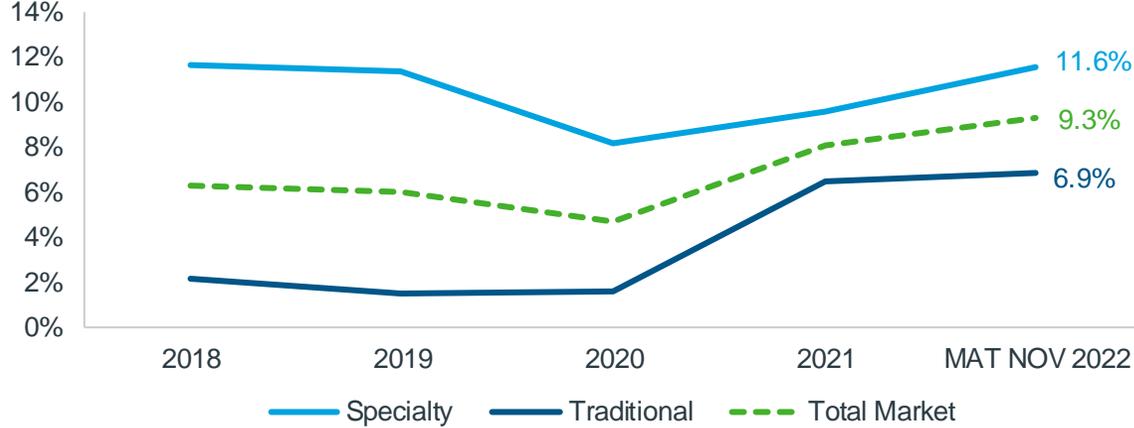
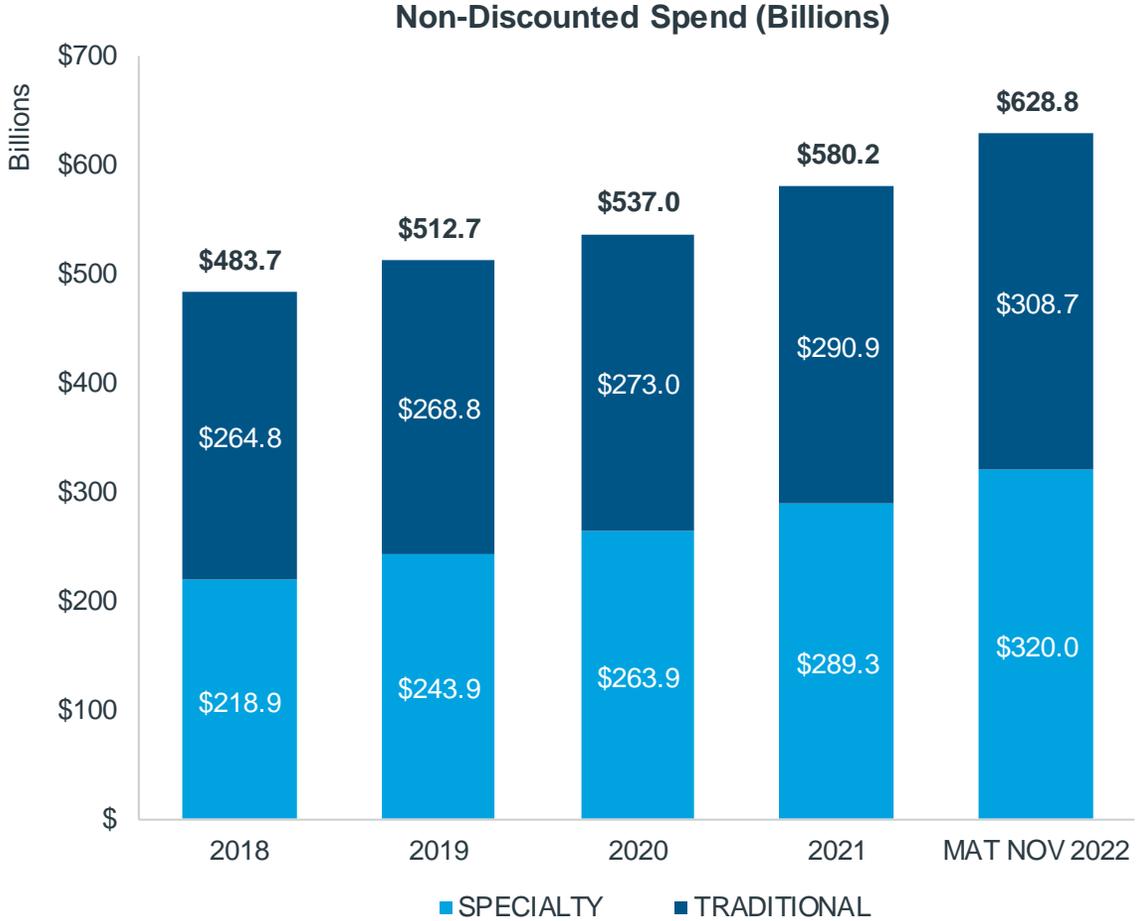
Growth (%) of Sales



Source: IQVIA, National Sales Perspectives, November 2022  
 Note: Limited to Rx and OTC Insulins; includes Retail, Non-Retail and Mail

# For the total market, specialty growth outpaces traditional growth and now has ~51% share of total non-discounted spend

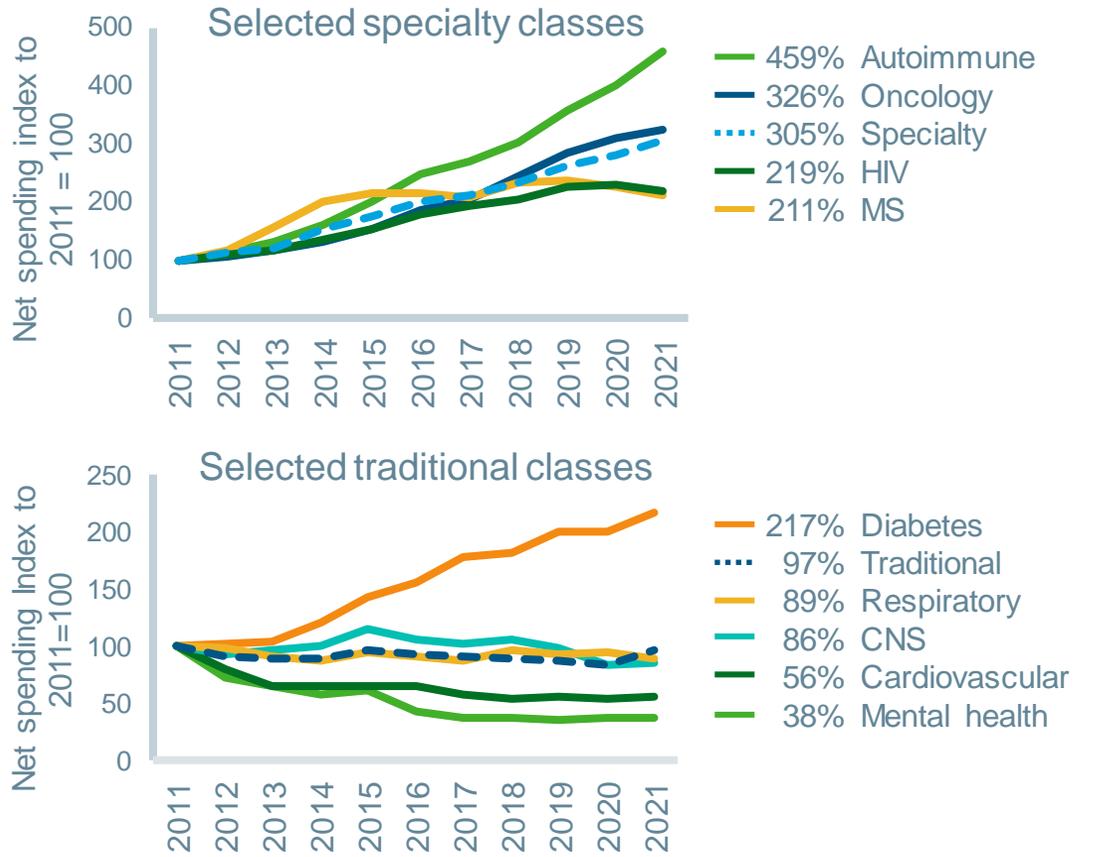
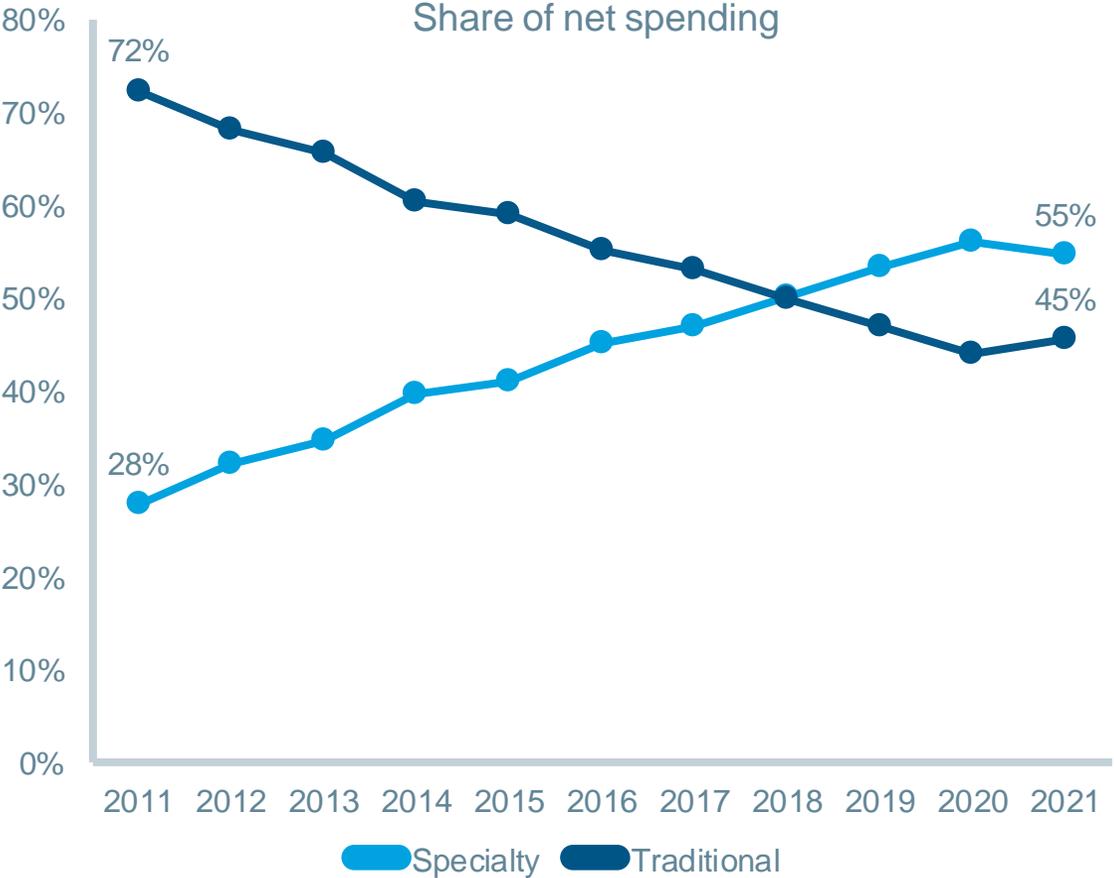
*In MAT November 2022, specialty spend grew by 11.6% while traditional growth grew 6.9%*



Source: IQVIA, National Sales Perspectives, November 2022  
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# Specialty medicines now account for 55% of net spending, up from 28% in 2011, driven by growth in auto-immune and oncology

Share of spending at estimated net manufacturer prices

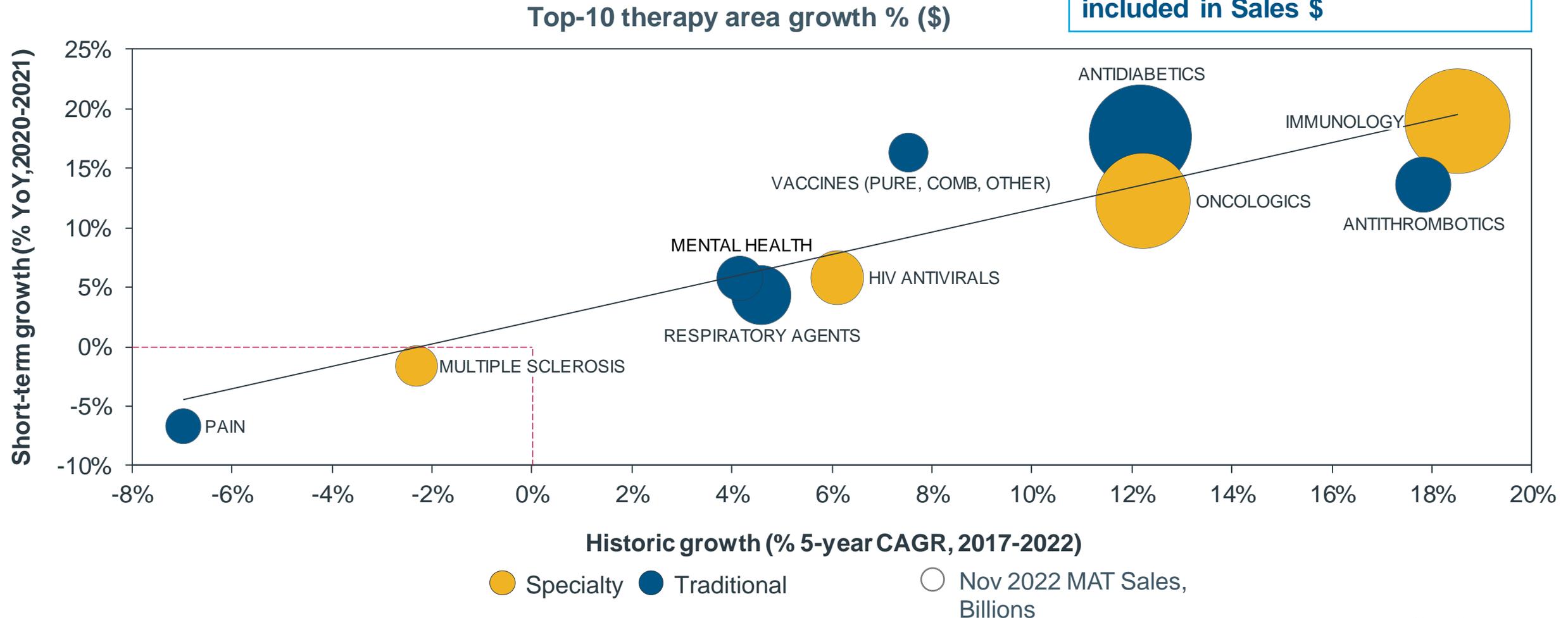


Source: IQVIA Institute, Mar 2022.  
 The Use of Medicines in the U.S.: Usage and Spending Trends and Outlook to 2026. Report by the IQVIA Institute for Human Data Science.  
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# Immunology and Antithrombotics lead short and long-term growth

Slowing growth was occurring prior to COVID-19, and is not the sole contributor

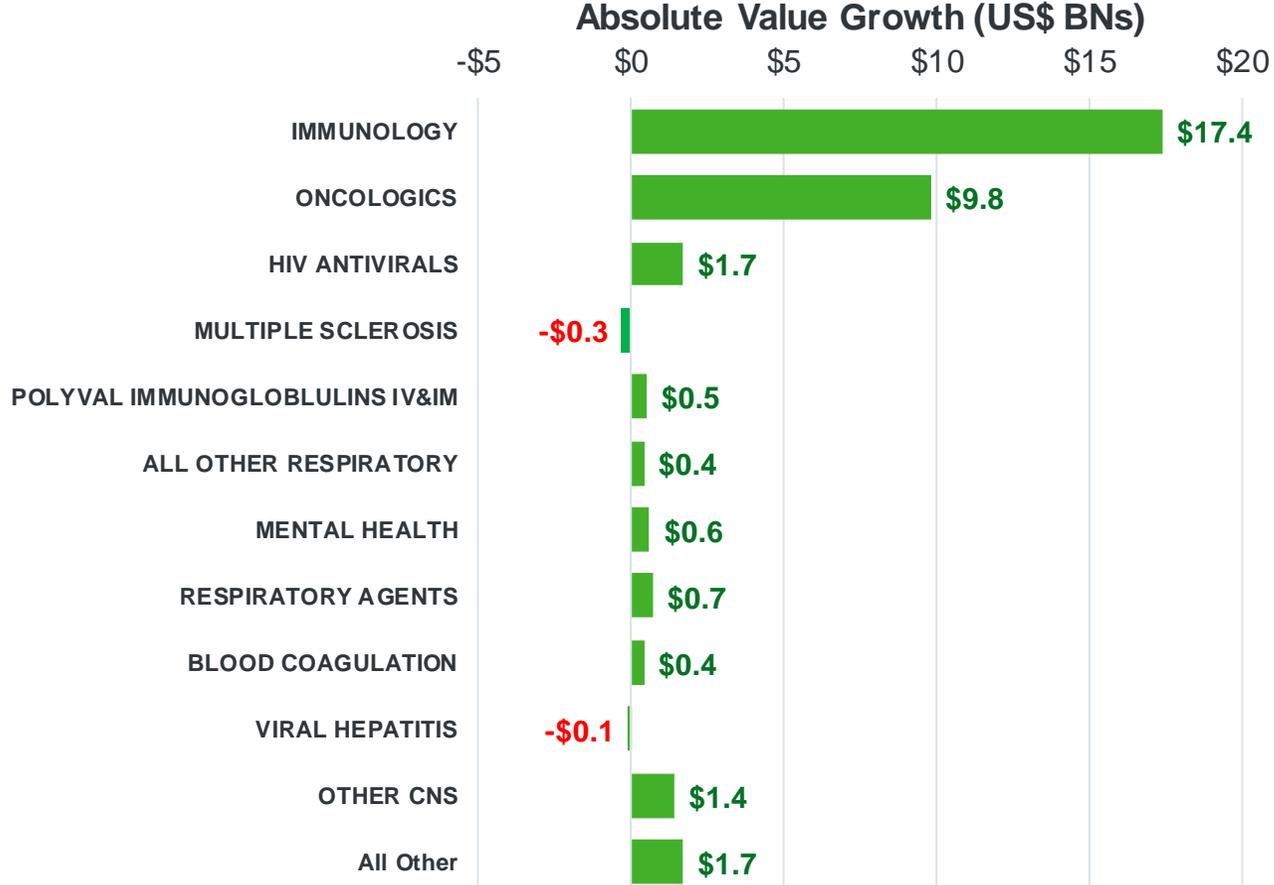
COVID-19 Vaccines are not included in Sales \$



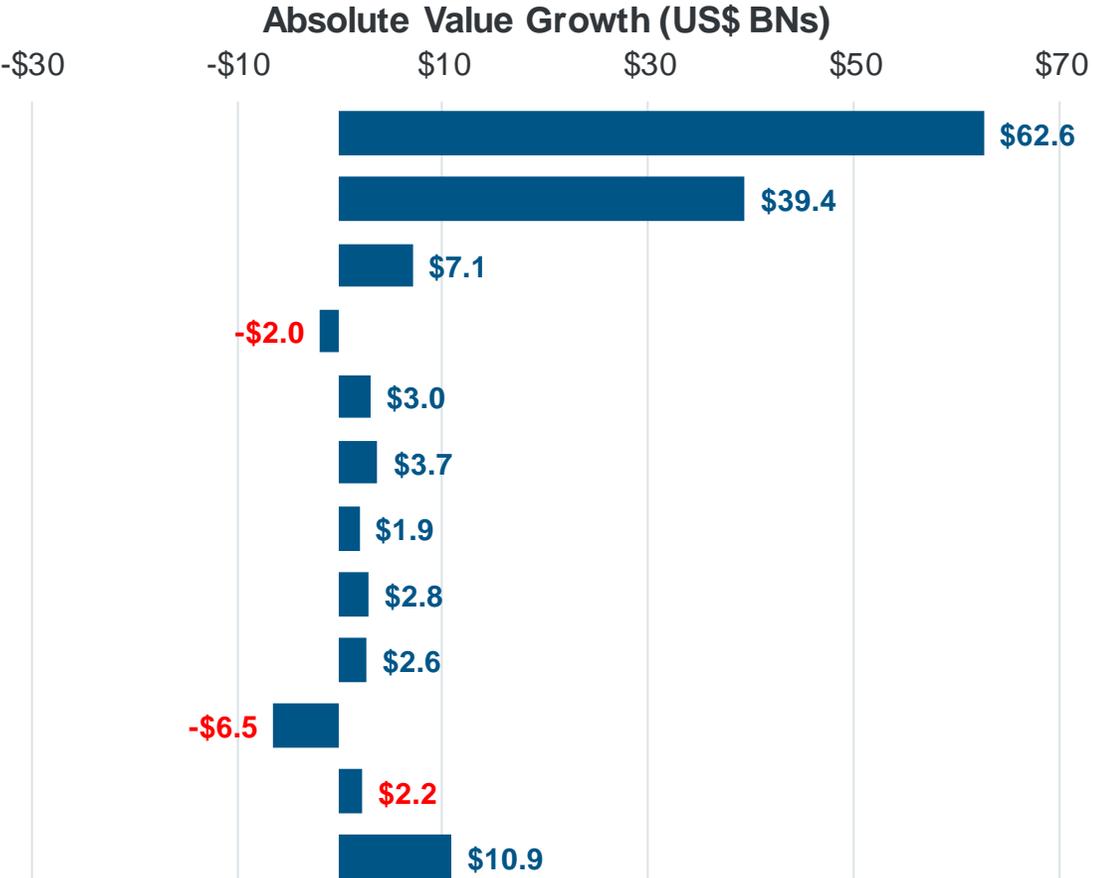
# Immunology and Oncologic contributed the most absolute value growth for specialty therapy areas

## Absolute Value Growth for Top Specialty Therapy Areas

ΔChange from MAT DEC 2021 to MAT DEC 2022



ΔChange from 2017 to MAT DEC 2022



Source: IQVIA, National Sales Perspectives, December 2022  
 Note: top therapy areas ranked on MAT March 2022 non-discounted spend  
 \*For Client's internal use only

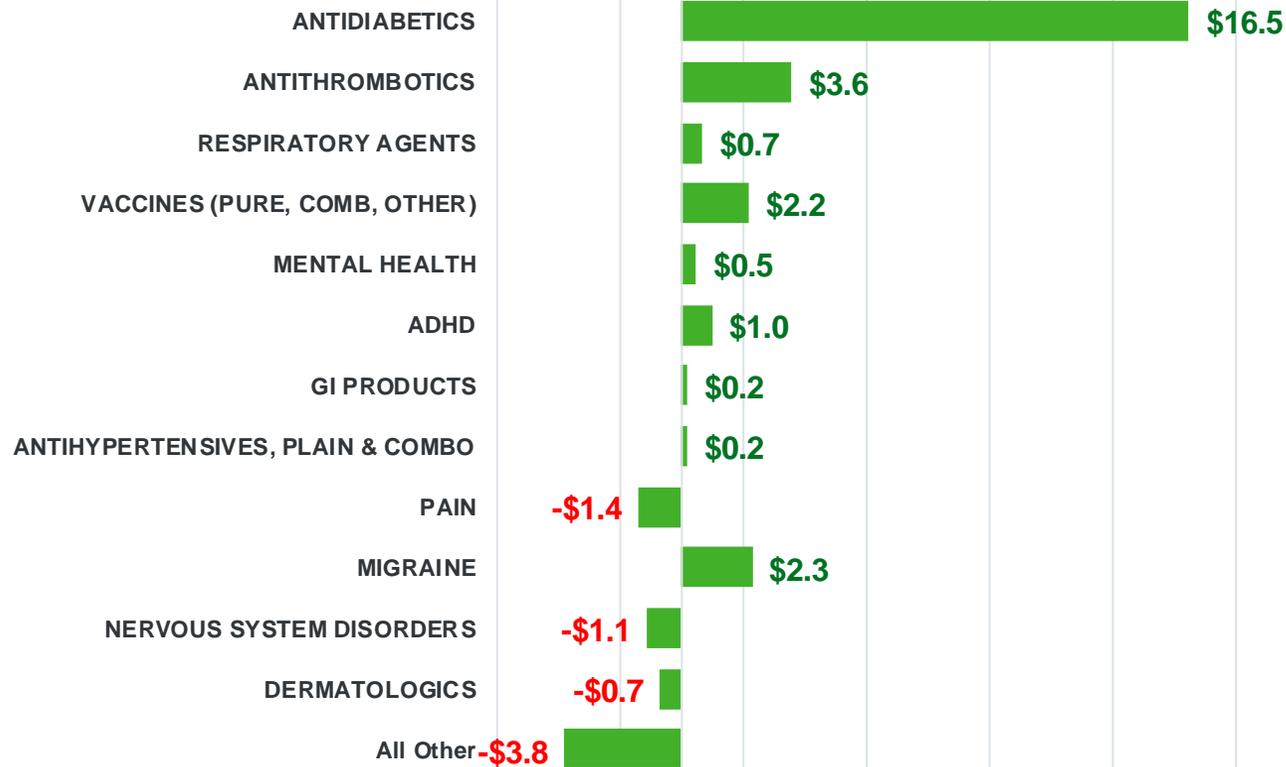
# Antidiabetics and Antithrombotics lead absolute value growth for traditional therapy areas

## Absolute Value Growth for Top Traditional Therapy Areas

ΔChange from MAT DEC 2021 to MAT DEC 2022

Absolute Value Growth (US\$ BNs)

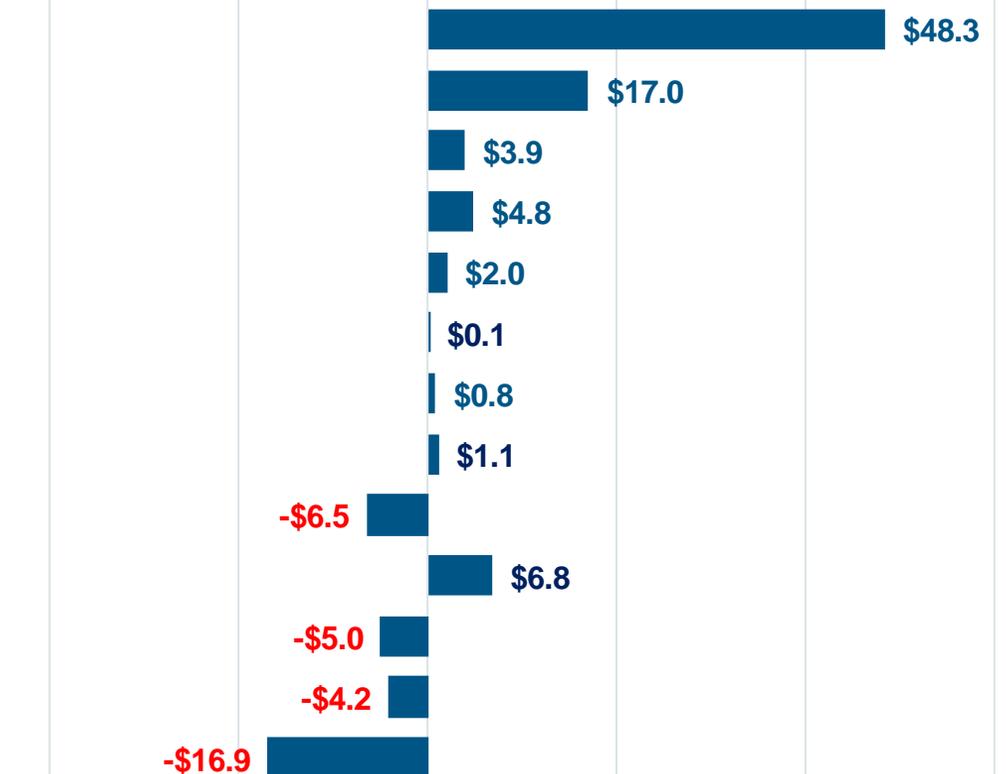
-\$6    -\$2    \$2    \$6    \$10    \$14    \$18



ΔChange from DEC 2017 to MAT DEC 2022

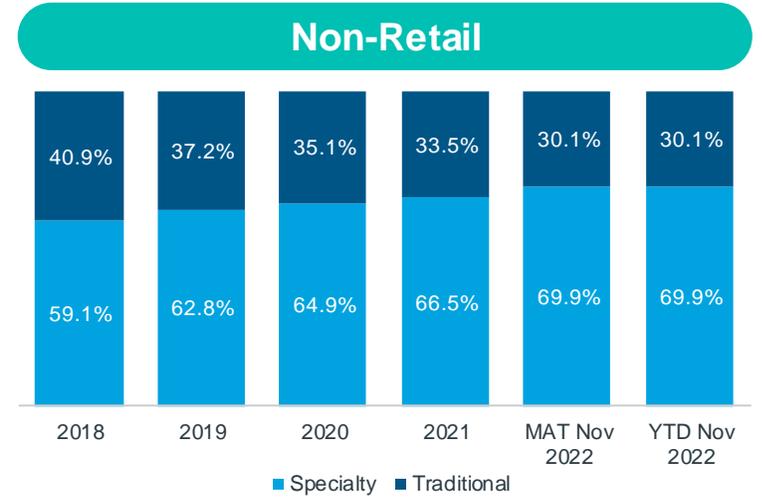
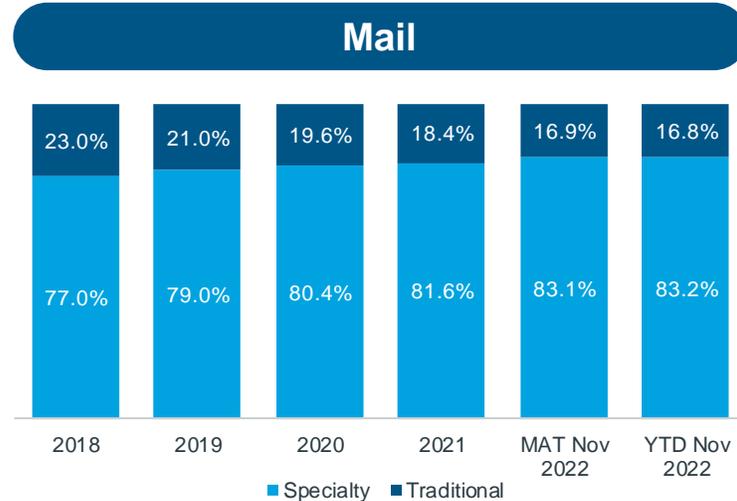
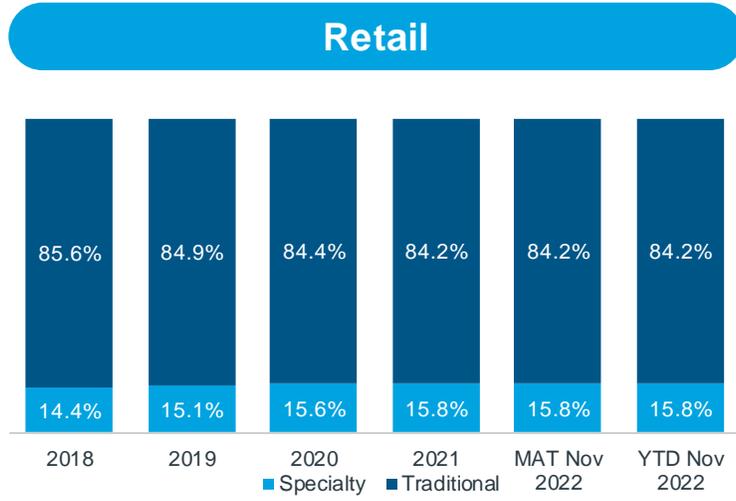
Absolute Value Growth (US\$ BNs)

-\$40    -\$20    \$0    \$20    \$40    \$60

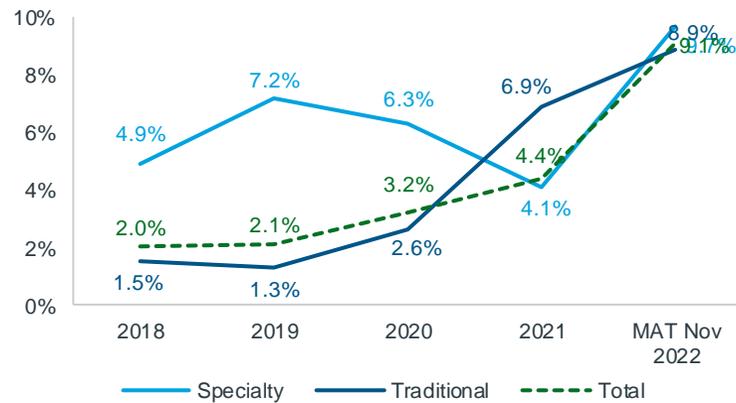


# Specialty sales increase in all channels over time

% of sales \$



YOY sales \$ growth



Data is based on Rx and OTC Insulins only

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# HIV Antivirals is the largest specialty category in Retail

## Top 10 Specialty Therapies for Retail, Mail, and Non-Retail MAT November 2022 (in \$ Billions)

RETAIL		
Therapy	MAT Nov 2022	YoY Growth
HIV ANTIVIRALS	17.0	4.4%
IMMUNOLOGY	9.5	17.8%
MENTAL HEALTH	2.5	8.5%
ONCOLOGICS	2.5	3.0%
ANTI-INFLAMMATORY AND DIGESTIVE ENZYMES AND MODULATORS	2.3	11.3%
LIPID REGULATORS	1.6	40.9%
VIRAL HEPATITIS	1.3	3.8%
OTHER CNS	0.8	51.1%
SEX HORMONES (ANDROGENS, OESTROGENS, PROGESTOGENS)	0.7	1.4%
MULTIPLE SCLEROSIS	0.6	-7.6%

MAIL		
Therapy	MAT Nov 2022	YoY Growth
IMMUNOLOGY	79.5	21.5%
ONCOLOGICS	24.1	14.6%
MULTIPLE SCLEROSIS	10.0	-6.3%
HIV ANTIVIRALS	5.4	5.6%
ALL OTHER RESPIRATORY	4.4	8.7%
RESPIRATORY AGENTS	2.8	22.0%
OTHER CARDIOVASCULARS	2.4	5.8%
GROWTH HORMONES	2.4	2.8%
BLOOD COAGULATION	2.2	10.4%
VIRAL HEPATITIS	2.0	-5.5%

NON-RETAIL		
Therapy	MAT Nov 2022	YoY Growth
ONCOLOGICS	61.7	11.9%
IMMUNOLOGY	18.4	9.6%
MULTIPLE SCLEROSIS	6.0	9.1%
POLYVAL IMMUNOGLOBULINS	5.2	8.5%
HIV ANTIVIRALS	5.2	10.9%
HEMATOPOIETIC GROWTH FACTORS	3.1	-13.2%
ERYTHROPOIETINS	2.6	-4.1%
MENTAL HEALTH	2.6	16.7%
IMMUNOSUPPRESSANTS	2.3	24.3%
RESPIRATORY AGENTS	2.1	8.2%

Source: IQVIA, National Sales Perspectives, 2022. Limited to Rx and OTC Insulins

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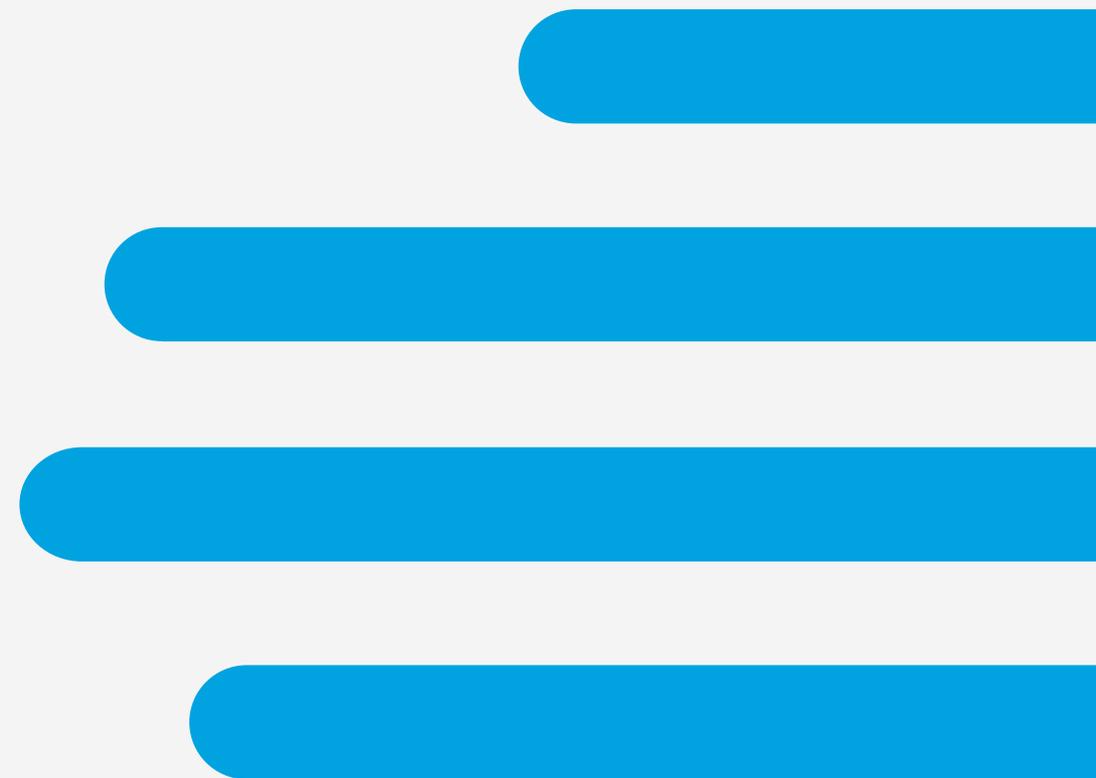
# The top 10 products are growing at 26.2% and account for 22.7% market share

Rank	Product	Non-Discounted Spend (US\$ BNs)			
		MAT SEP 2022	Market Share	ABS Growth	Growth
1	HUMIRA	\$30.3	4.9%	\$4.0	15.2%
2	ELIQUIS	\$18.1	2.9%	\$3.0	20.3%
3	TRULICITY	\$15.0	2.4%	\$3.7	32.6%
4	OZEMPIC	\$13.3	2.2%	\$5.8	76.9%
5	STELARA	\$13.1	2.1%	\$3.0	29.8%
6	KEYTRUDA	\$12.1	2.0%	\$2.7	29.0%
7	BIKTARVY	\$11.0	1.8%	\$1.9	20.5%
8	JARDIANCE	\$10.8	1.7%	\$3.5	47.3%
9	ENBREL	\$8.7	1.4%	\$0.7	8.9%
10	XARELTO	\$7.9	1.3%	\$0.9	12.5%
<b>TOP 10</b>		<b>\$140.1</b>	<b>22.7%</b>	<b>\$29.1</b>	<b>26.2%</b>

# The top 20 products are growing at 24.6% and account for 30.7% market share

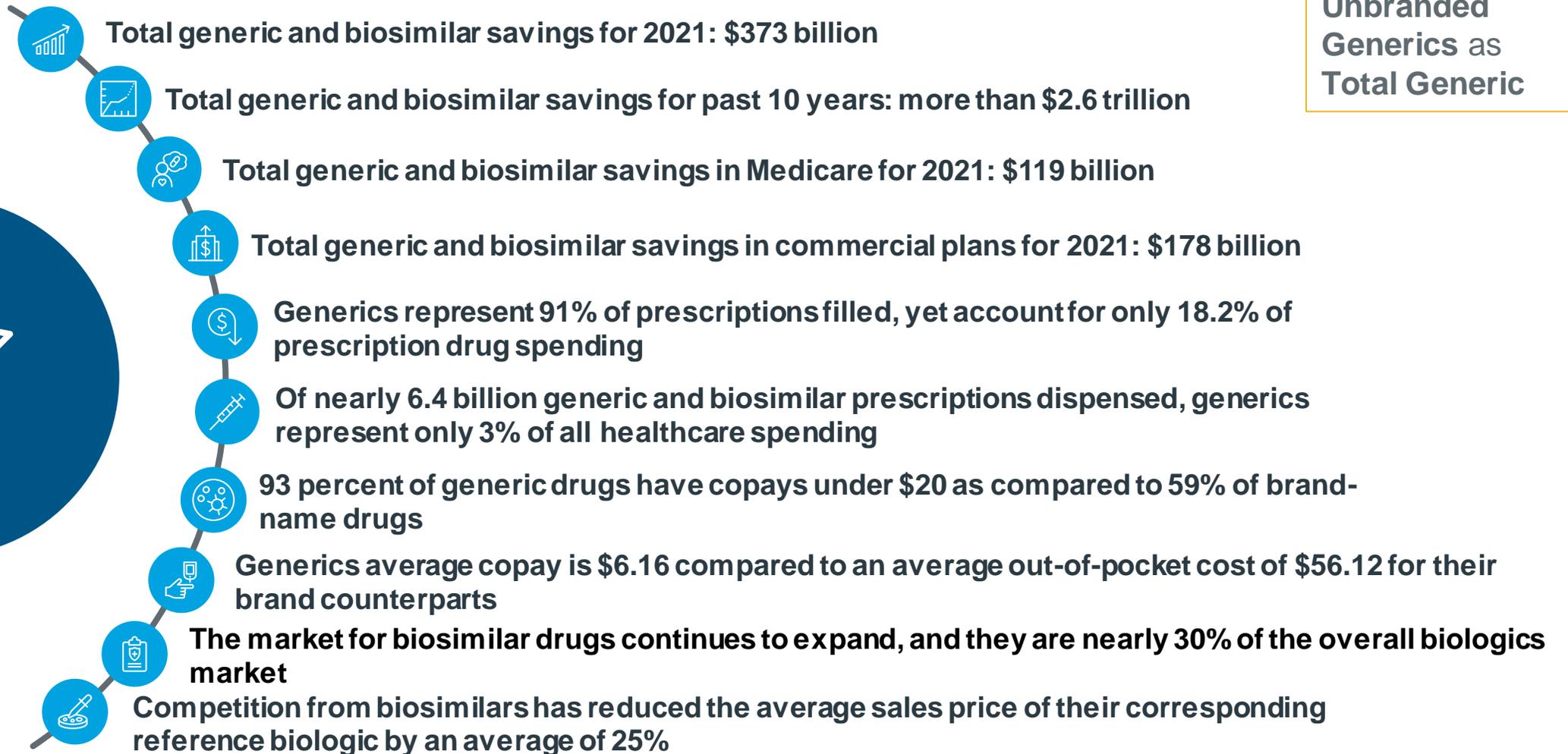
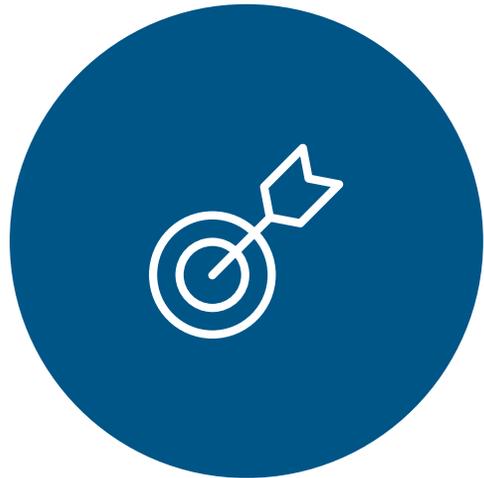
Rank	Product	Non-Discounted Spend (US\$ BNs)			
		MAT SEP 2022	Market Share	ABS Growth	Growth
11	DUPIXENT	\$7.3	1.2%	\$2.2	43.7%
12	JANUVIA	\$6.4	1.0%	\$0.0	-0.1%
13	FARXIGA	\$5.1	0.8%	\$1.8	55.0%
14	OPDIVO	\$4.7	0.8%	\$0.6	15.8%
15	LANTUS SOLOSTAR	\$4.6	0.8%	-\$0.4	-8.6%
16	OCREVUS	\$4.6	0.7%	\$0.7	16.6%
17	VYVANSE	\$4.5	0.7%	\$0.5	13.4%
18	TALTZ	\$4.5	0.7%	\$0.9	26.1%
19	LATUDA	\$4.2	0.7%	\$0.2	5.7%
20	SKYRIZI	\$4.2	0.7%	\$1.9	82.3%
<b>TOP 20</b>		<b>\$190.2</b>	<b>30.7%</b>	<b>\$38.5</b>	<b>24.6%</b>

# Generics & Biosimilars

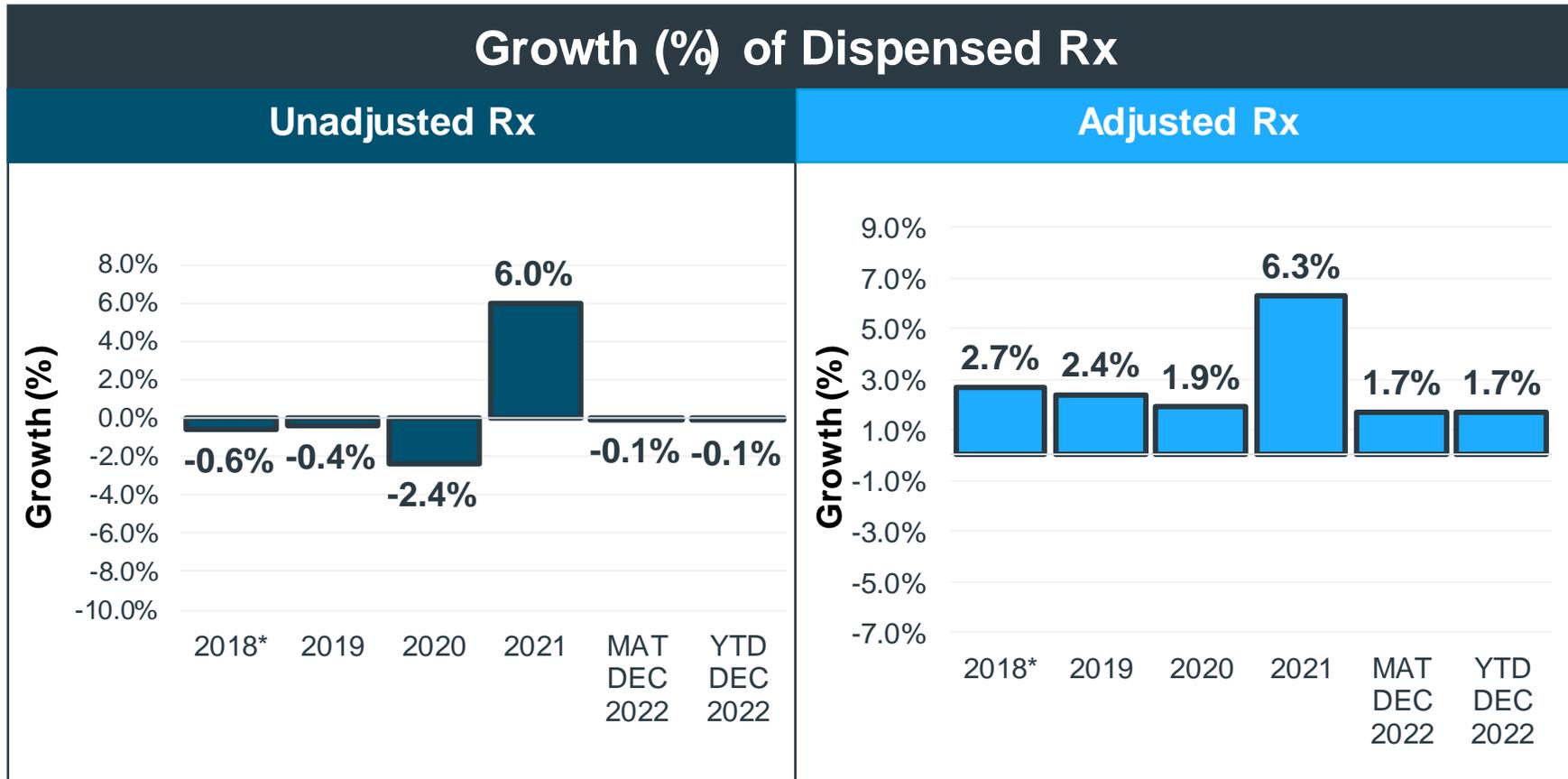


# 2022 AAM U.S. Generic & Biosimilar Medicines Savings Report

AAM Report describes **Branded and Unbranded Generics as Total Generic**



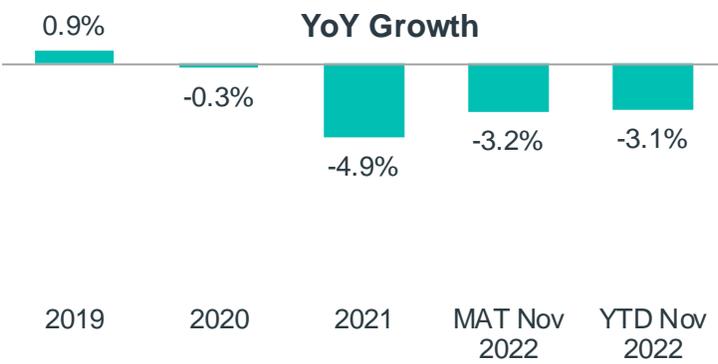
# Unadjusted Rx growth for MAT and YTD December is negative, but Adjusted growth is higher



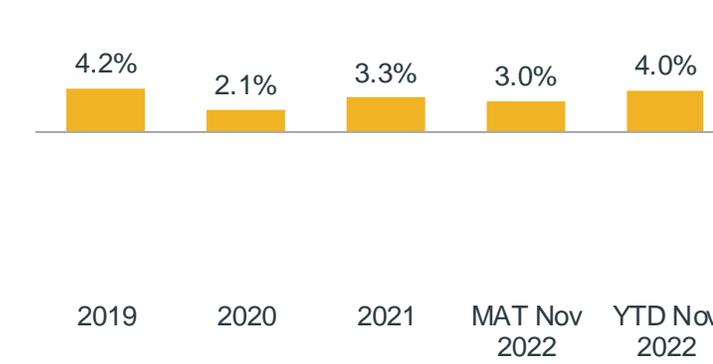
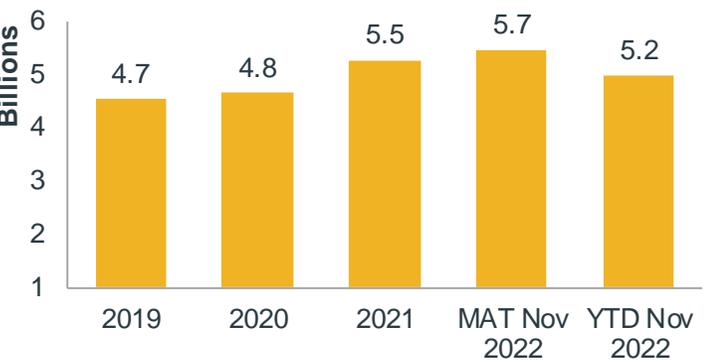
# Unbranded Generics sales are negative by Rx's are positive

Unbranded Generics

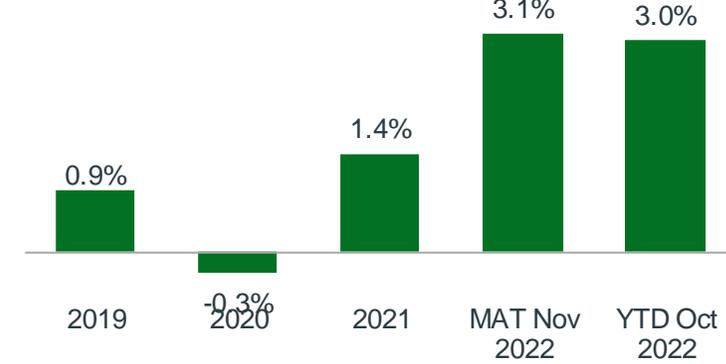
## Sales



## Adjusted Rx's

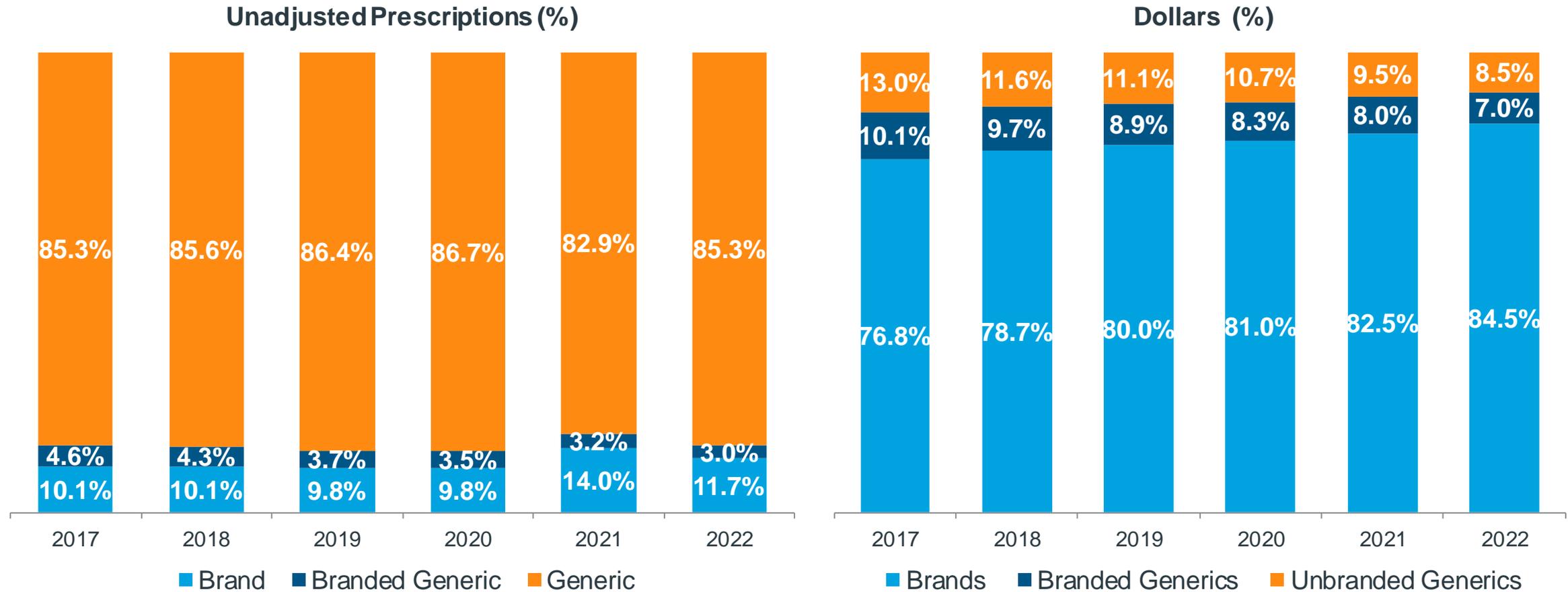


## Unadjusted Rx's



Source: IQVIA, National Sales Perspectives and RxInsights, 2022  
 Note: Limited to Rx and OTC Insulins; Includes Retail, Non-Retail and Mail

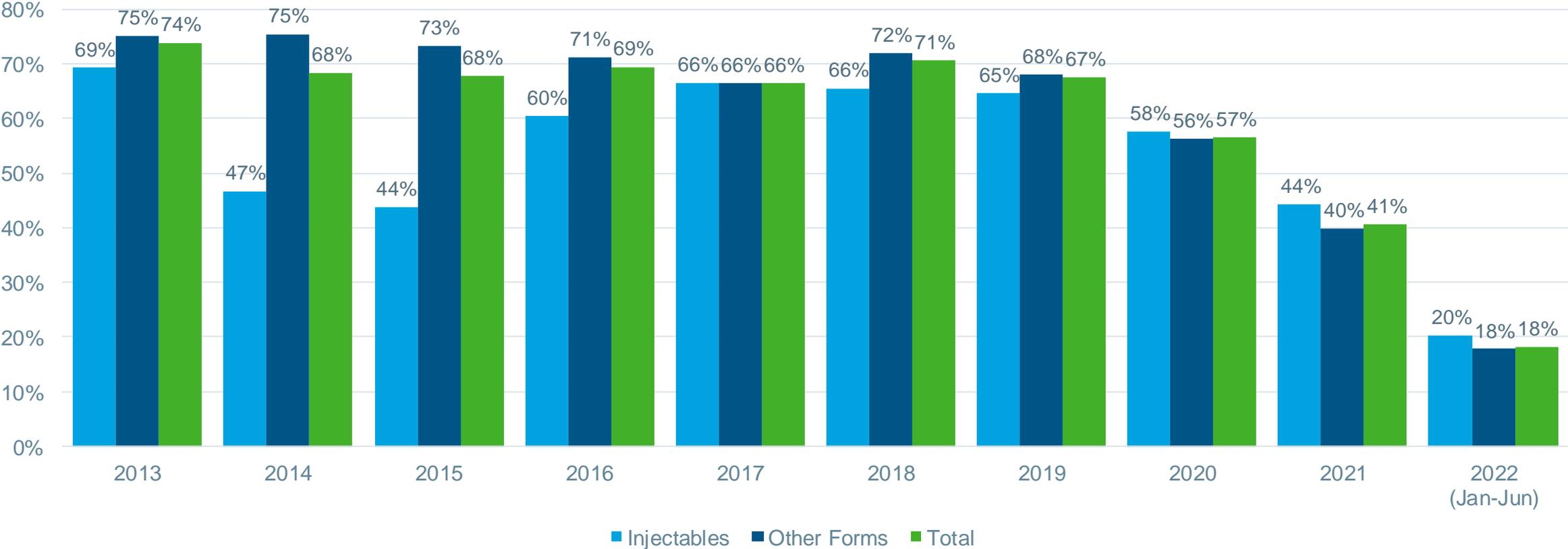
# 85.3% of prescriptions are dispensed as unbranded generics for 2022 (unadjusted)



# Unlaunched ANDAs account for 39% of approvals since 2013, 44% of injectables and 38% of other forms

*Approved injectable ANDAs launched much less often in 2014-2016 but differences narrowed since*

% of ANDAs launched to date by Type

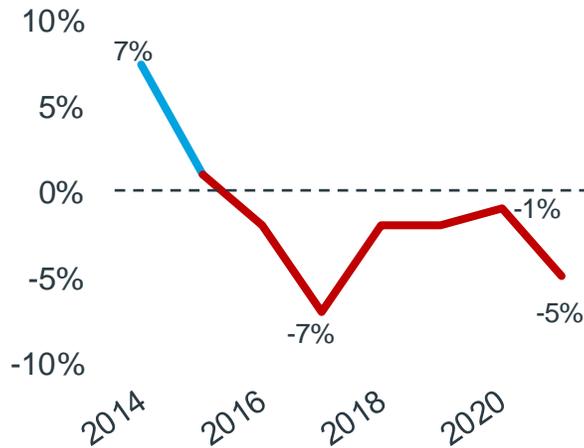


Source: FDA Orange Book June 2022; IQVIA National Sales Perspectives, IQVIA institute, Aug 2022

# Strong forces pressure the generics macroenvironment

## Powerful buyers

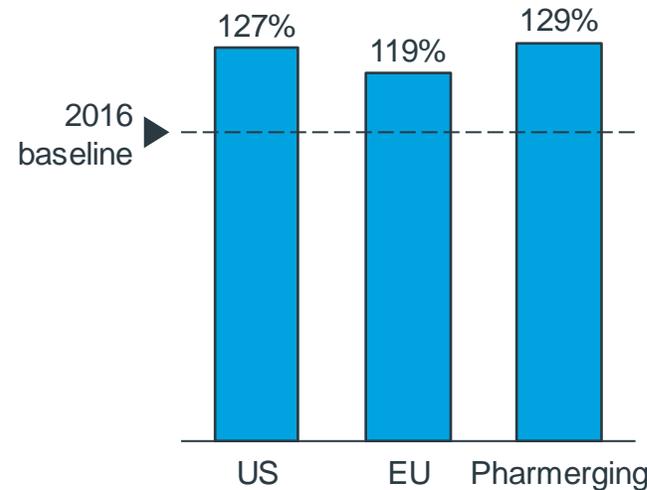
US Generics Net Price Growth



- 90% of US purchasing from top 3 wholesalers
  - WBA
  - Red Oak
  - ClarusOne

## Competition increases

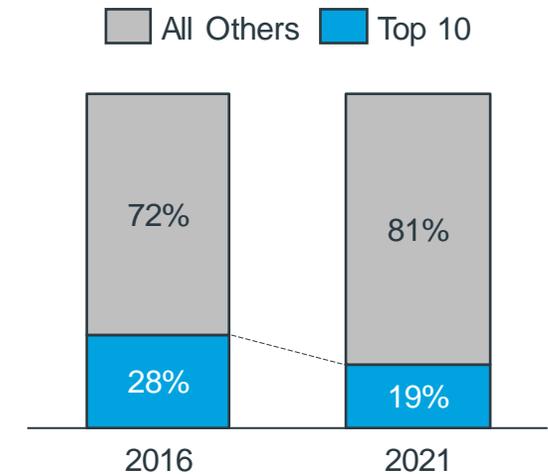
Number of Gx Players in 2021 vs 2016 (>\$10mn sales, Indexed to 2016)



- Rapid increase in competition in the US compared to Europe
- This is driving fragmentation
- Manufacturers seek growth in Pharmerging

## Fragmentation

Market share of top 10 Gx companies (2016-21, USD)



- Rapid rise of competition, has eroded share from top 10
- The Gx sector is increasingly fragmented

Notes: Generic companies with sales over \$10mn used to calculate crowding; Developed countries defined as US, EU4 + UK and Ja pan. Excluded TAs = hospital solutions, Kanpo and Chinese, imaging agents, Diagnostics, vaccines, non-therapeutic agents

Source: IQVIA EMEA Thought Leadership; IQVIA MIDAS MAT Q4 2021; Rx only; Innovation insights; IQVIA Institute General US Medicines Spending Outlook 2018-2023

# Total market Orals, Solid **dollar** share is declining, while injectables and systemics share is growing

## Total Market

Formulation	2017 Share	MAT JUN 2022 Share
DERMATOLOGICALS	2.4%	1.1%
INHALANTS	3.9%	3.9%
INJECTABLES	35.9%	43.8%
ORALS, SOLID	43.9%	38.8%
OTHER	8.1%	5.4%
SYSTEMICS	5.7%	7.0%



Formulation	2017 Share	MAT JUN 2022 Share
DERMATOLOGICALS	0.7%	0.3%
INHALANTS	3.8%	3.8%
INJECTABLES	40.7%	47.0%
ORALS, SOLID	43.5%	39.0%
OTHER	4.5%	2.0%
SYSTEMICS	6.9%	7.9%

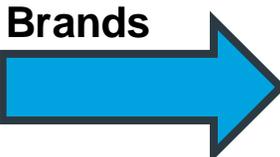
Formulation	2017 Share	MAT JUN 2022 Share
DERMATOLOGICALS	7.5%	4.4%
INHALANTS	2.1%	6.0%
INJECTABLES	16.7%	24.0%
ORALS, SOLID	62.9%	51.4%
OTHER	10.0%	12.9%
SYSTEMICS	0.8%	1.4%

Source: IQVIA, National Sales Perspectives, June 2022  
 \*For Client's internal use only

# Orals, Solid account for 86.6% of total market **adjusted scripts** and 92.1% of unbranded generic adjusted scripts for MAT DEC 2022

## Total Market

Formulation	2015 Share	MAT DEC 2022 Share
DERMATOLOGICALS	2.1%	2.1%
INHALANTS	2.1%	2.2%
INJECTABLES	2.6%	4.9%
ORALS, SOLID	88.3%	86.6%
OTHER	4.6%	3.9%
SYSTEMICS	0.2%	0.4%



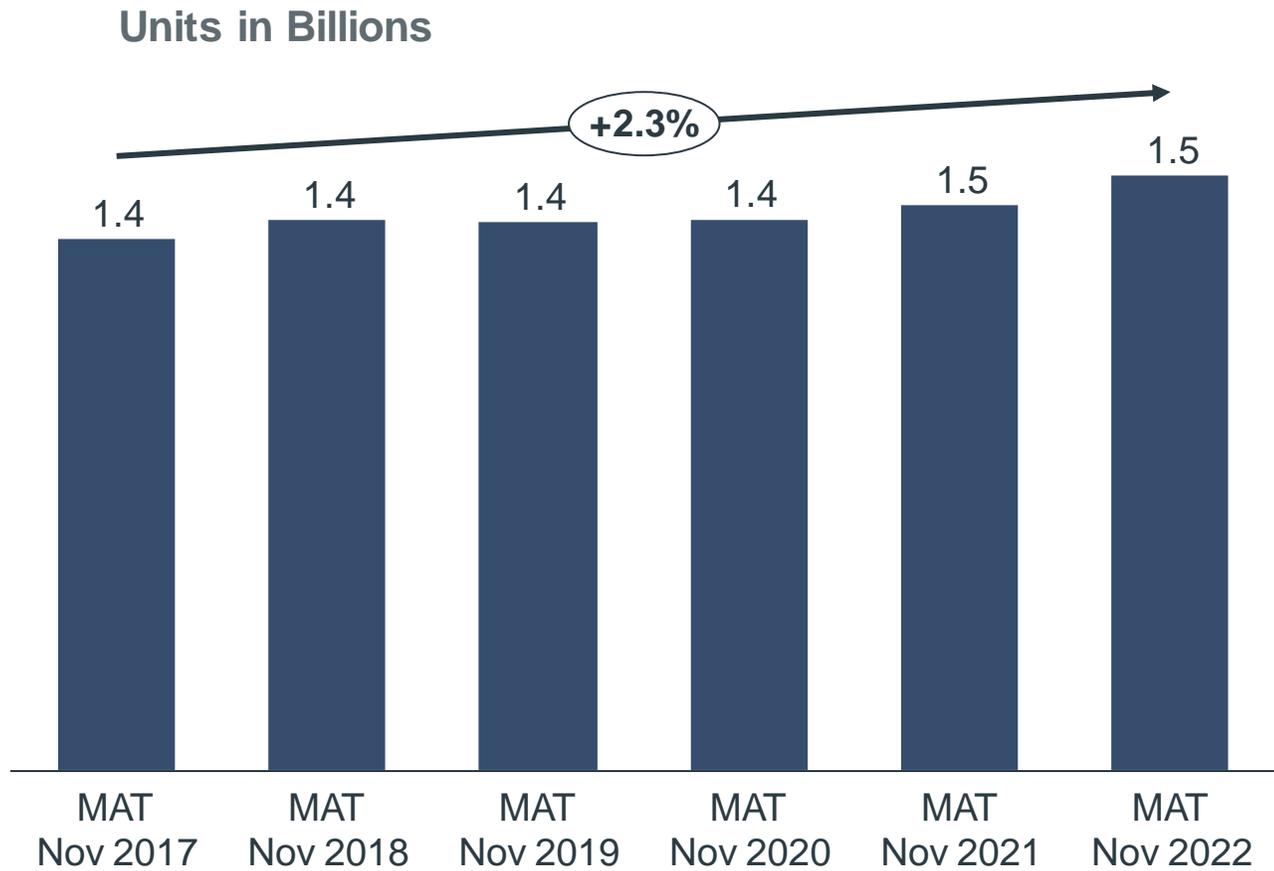
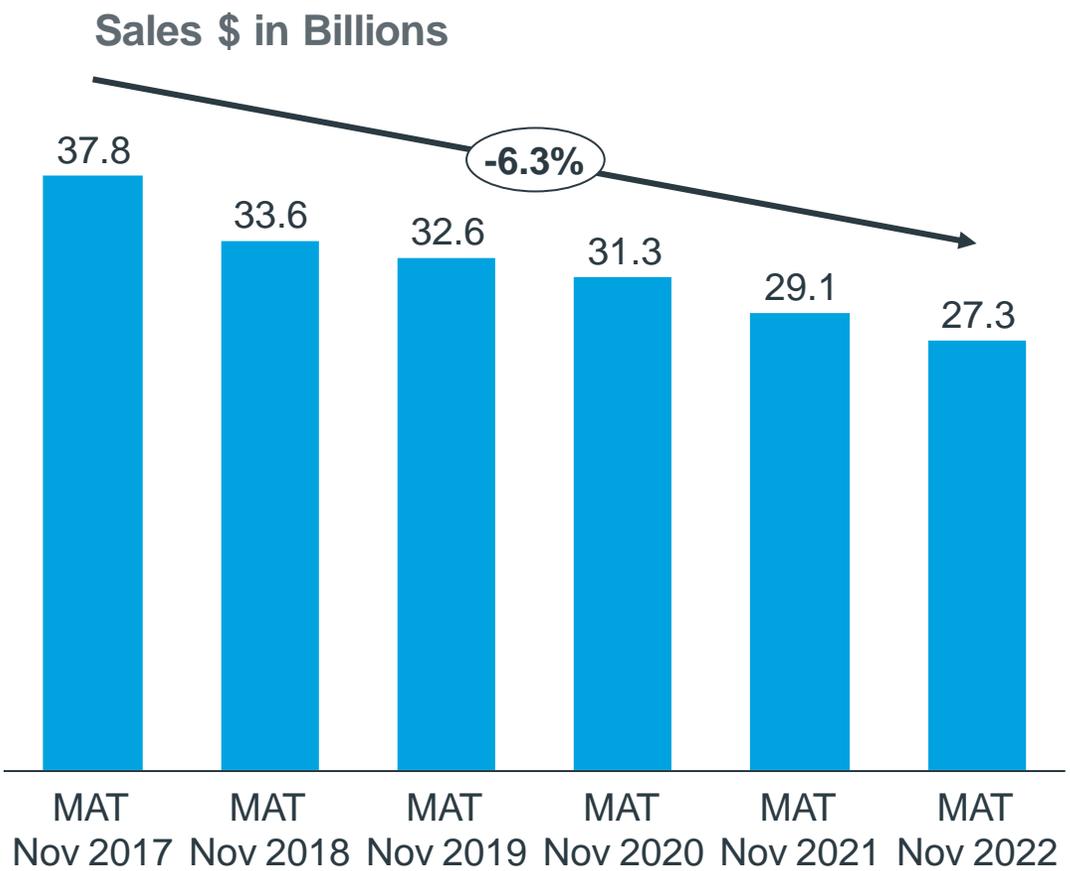
Formulation	2015 Share	MAT DEC 2022 Share
DERMATOLOGICALS	1.7%	0.5%
INHALANTS	8.6%	8.3%
INJECTABLES	17.0%	42.5%
ORALS, SOLID	60.5%	42.8%
OTHER	11.5%	3.7%
SYSTEMICS	0.8%	2.2%

Formulation	2015 Share	MAT DEC 2022 Share
DERMATOLOGICALS	2.1%	2.2%
INHALANTS	0.5%	1.4%
INJECTABLES	0.6%	0.7%
ORALS, SOLID	93.5%	92.1%
OTHER	3.1%	3.4%
SYSTEMICS	0.1%	0.2%



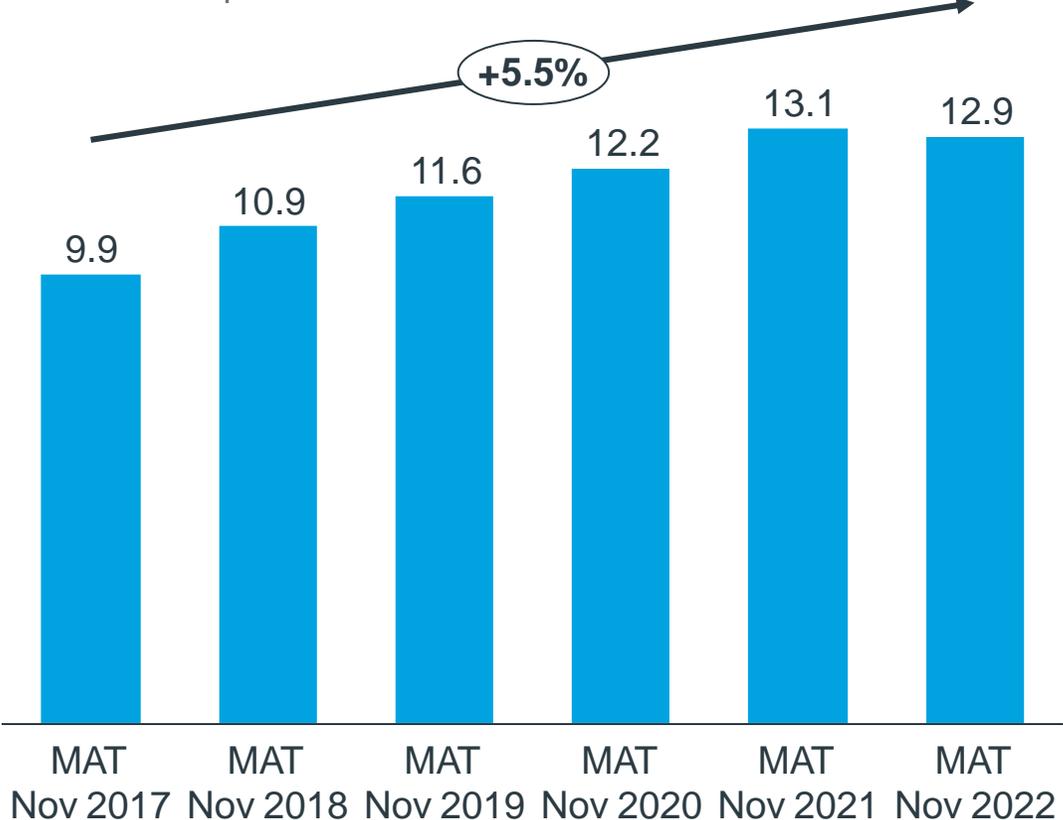
Source: IQVIA, RxInsights, December 2022  
\*For Client's internal use only

# Unbranded Generic Oral Solids CAGR sales decrease while units increase

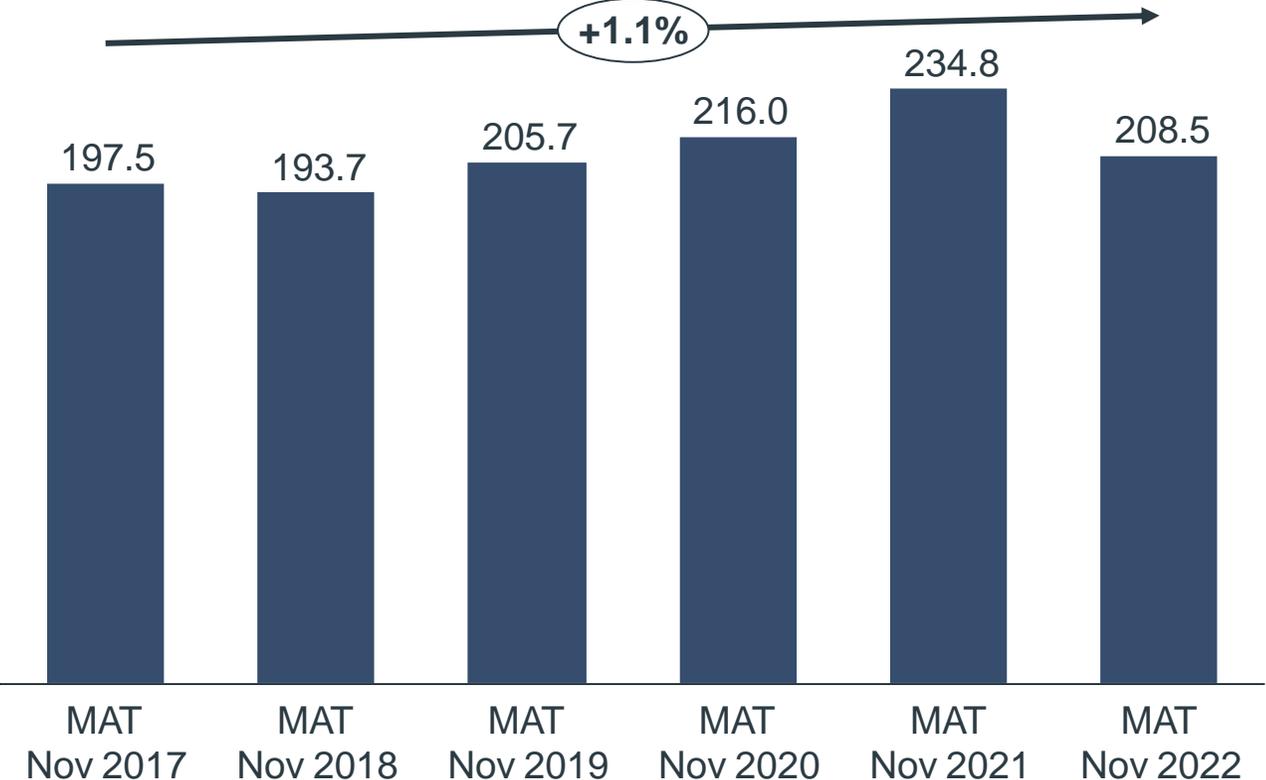


# Unbranded Generic Injectables CAGR sales and units increase

Sales \$ in Billions

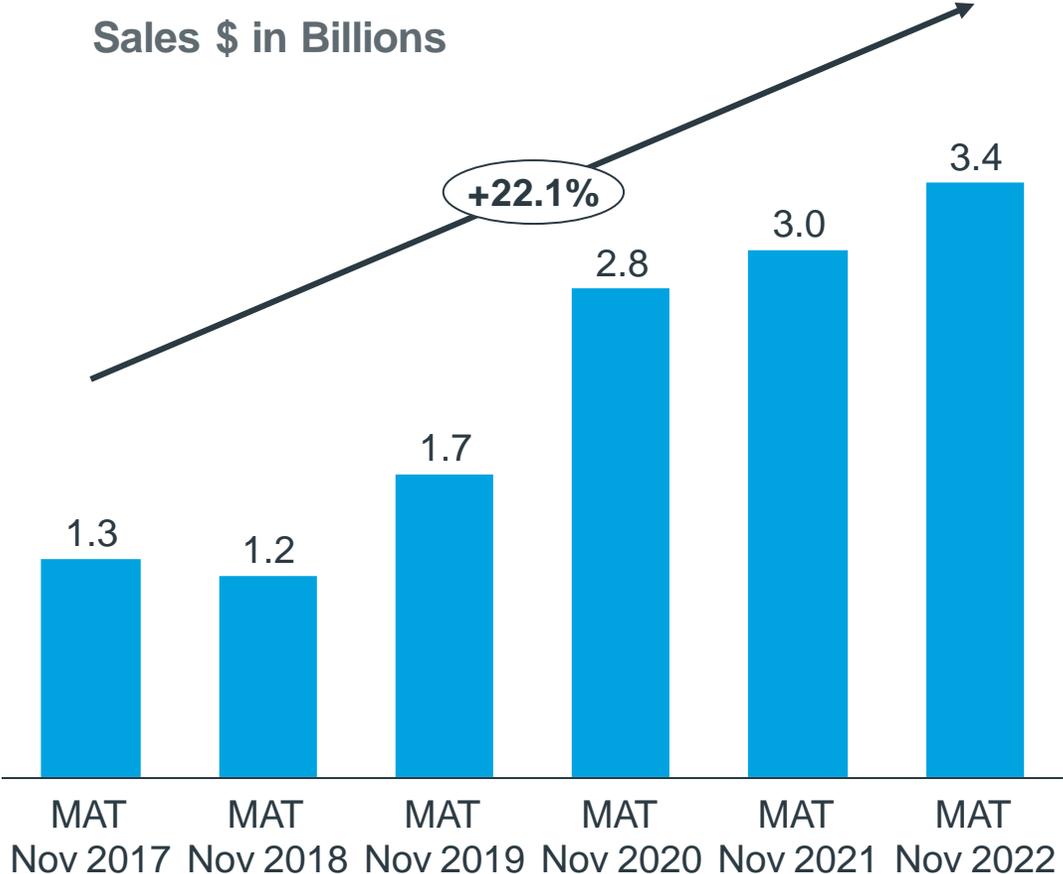


Units in Millions

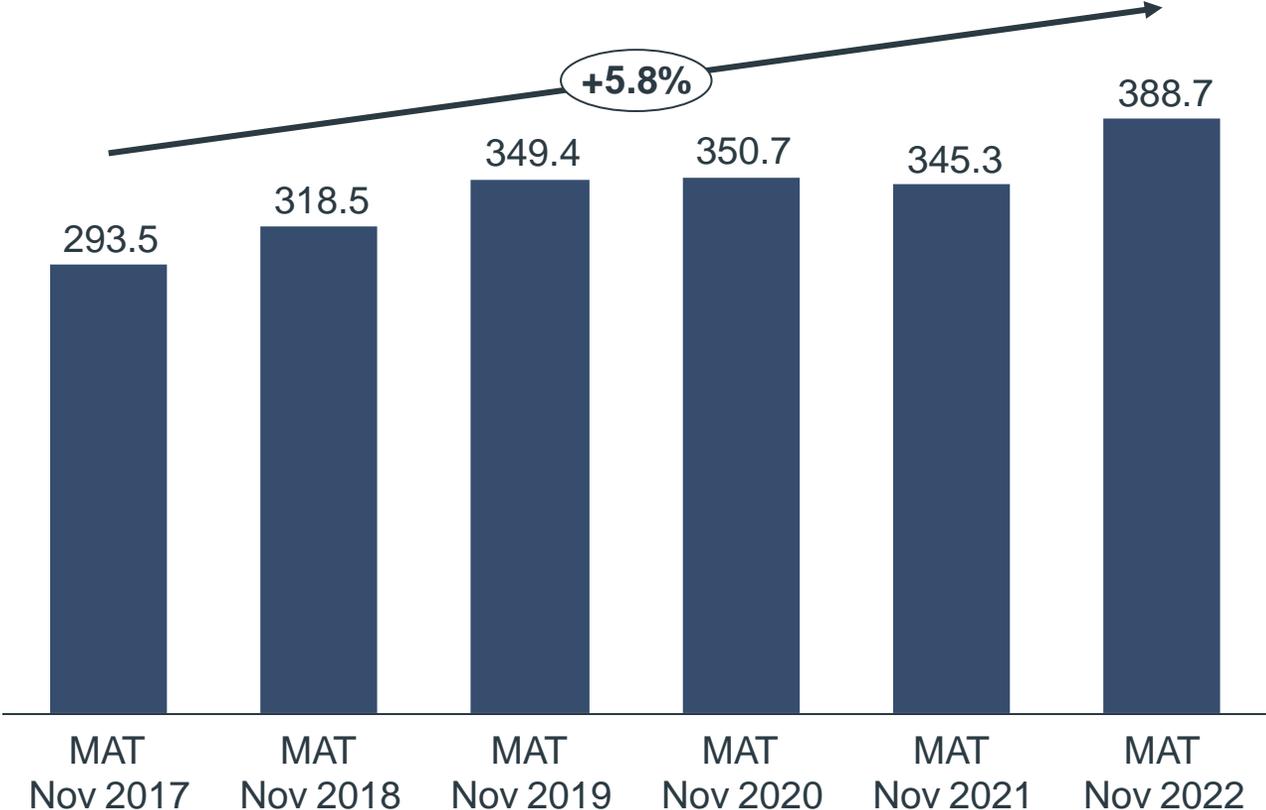


# Unbranded Generic Inhalants CAGR sales and units increase

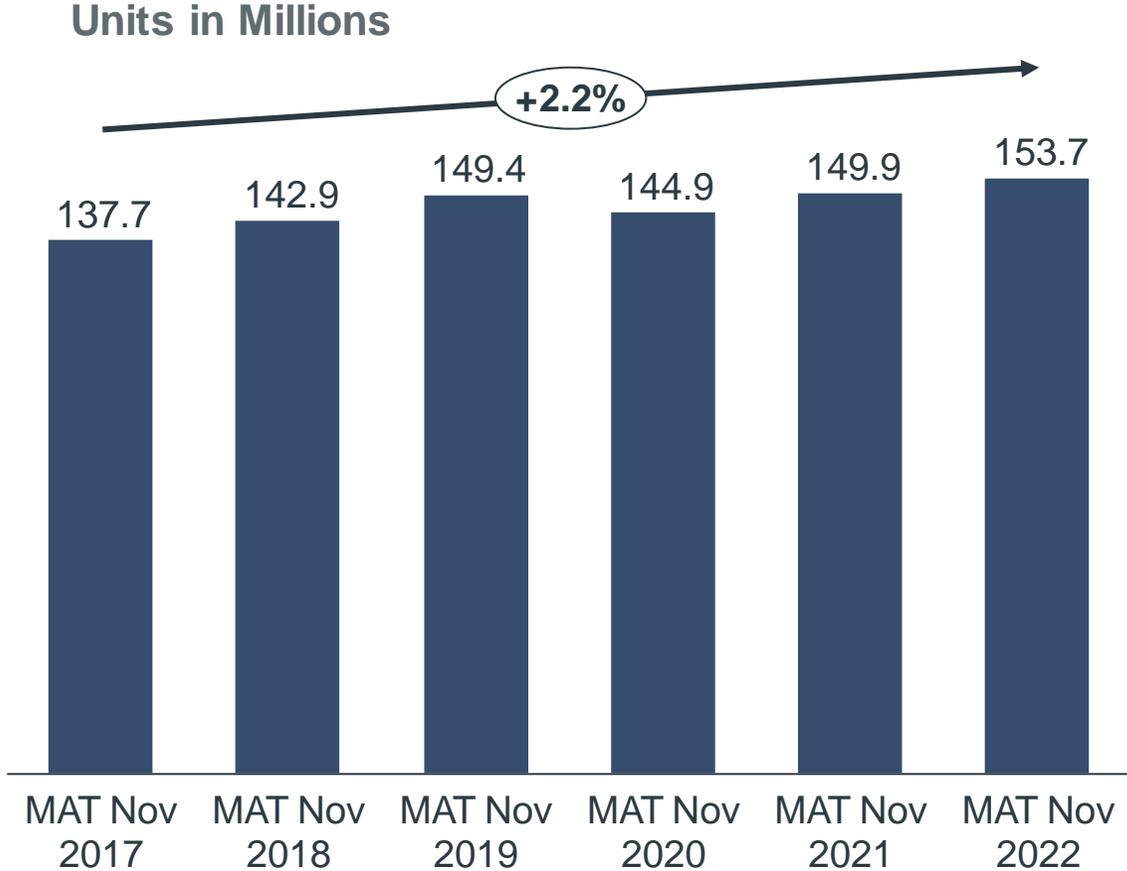
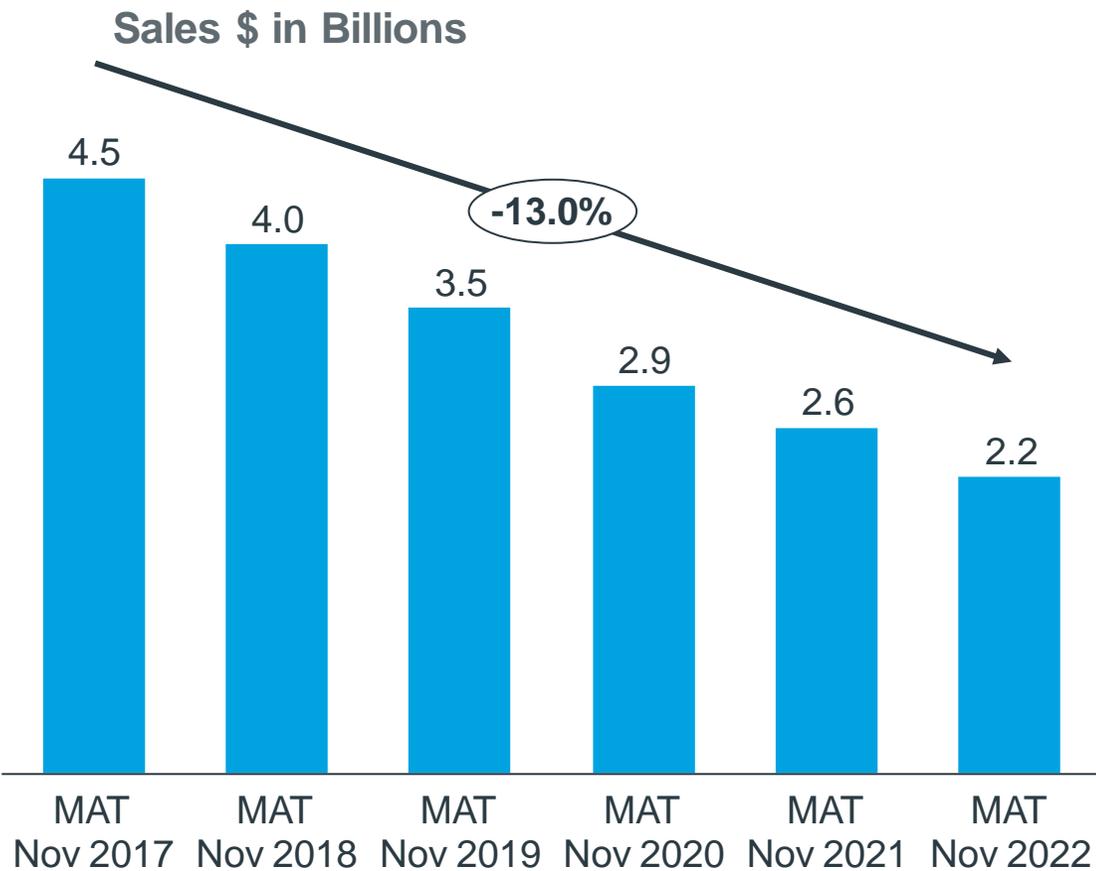
Sales \$ in Billions



Units in Millions

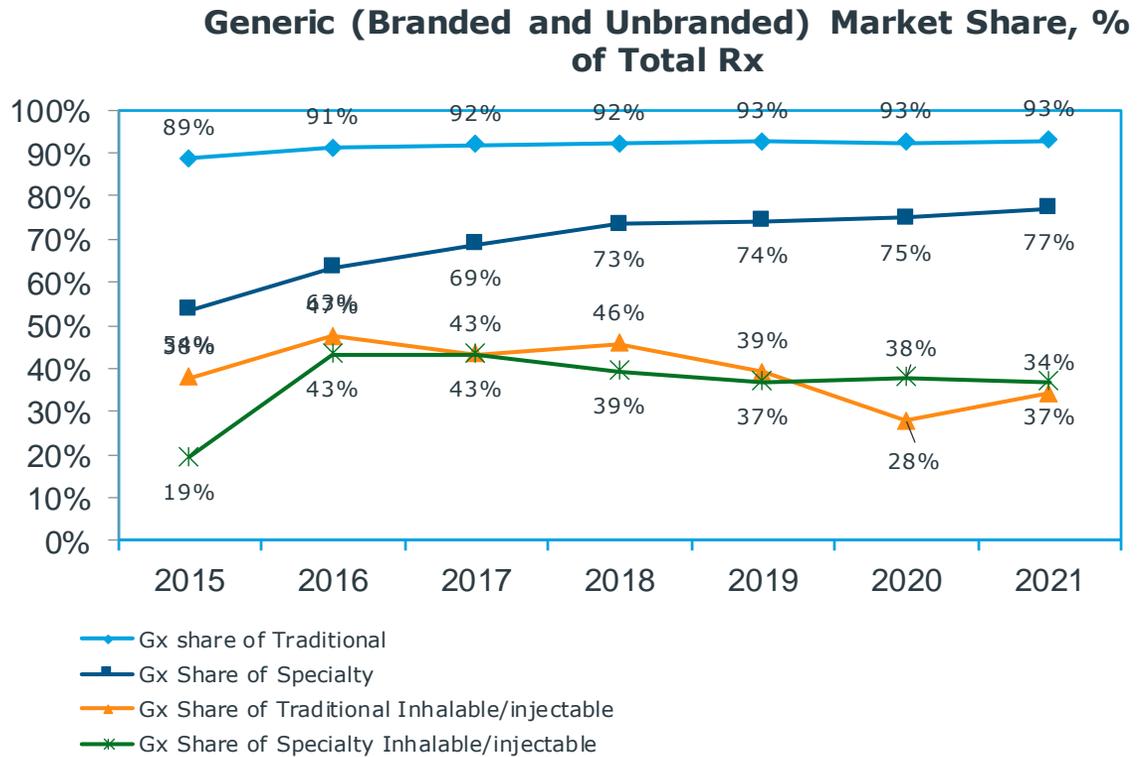


# Unbranded Generic Dermatological CAGR Sales decrease while units increase

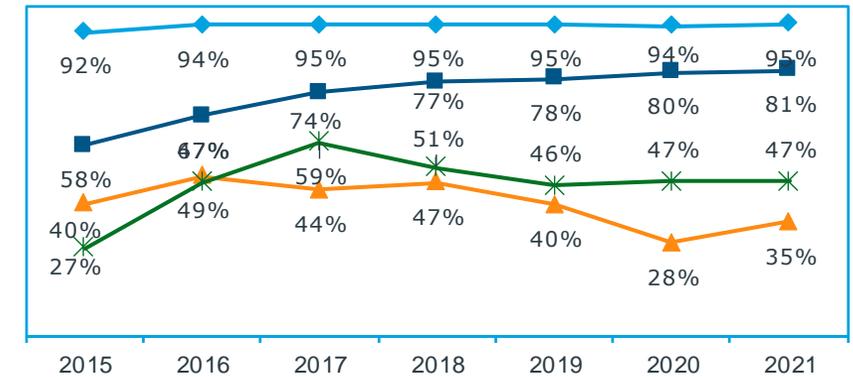


# Generic efficiency rate broken down: traditional, specialty, inhalable/injectable, specialty injectable

Generic shares of dispensed prescriptions



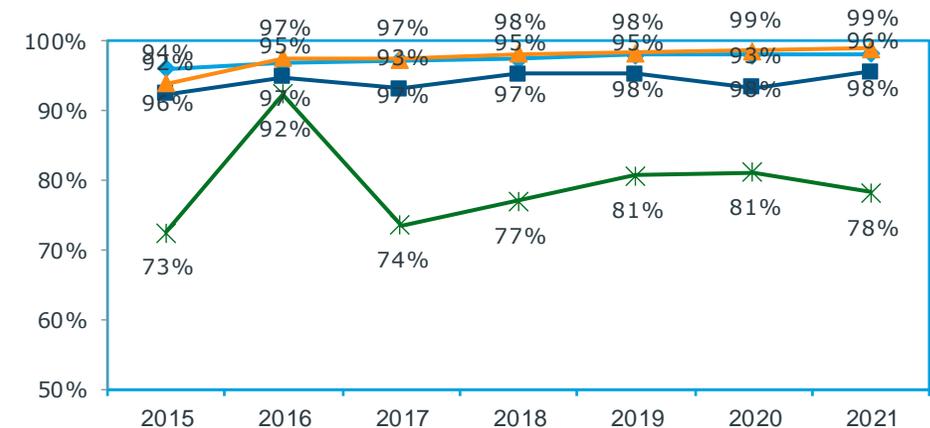
### Percent of Market Accessible to Generics, % of Total Rx by Segment



=

×

### Percent Dispensed as Generic when Available (% Generic of Rx Accessible to Generics)

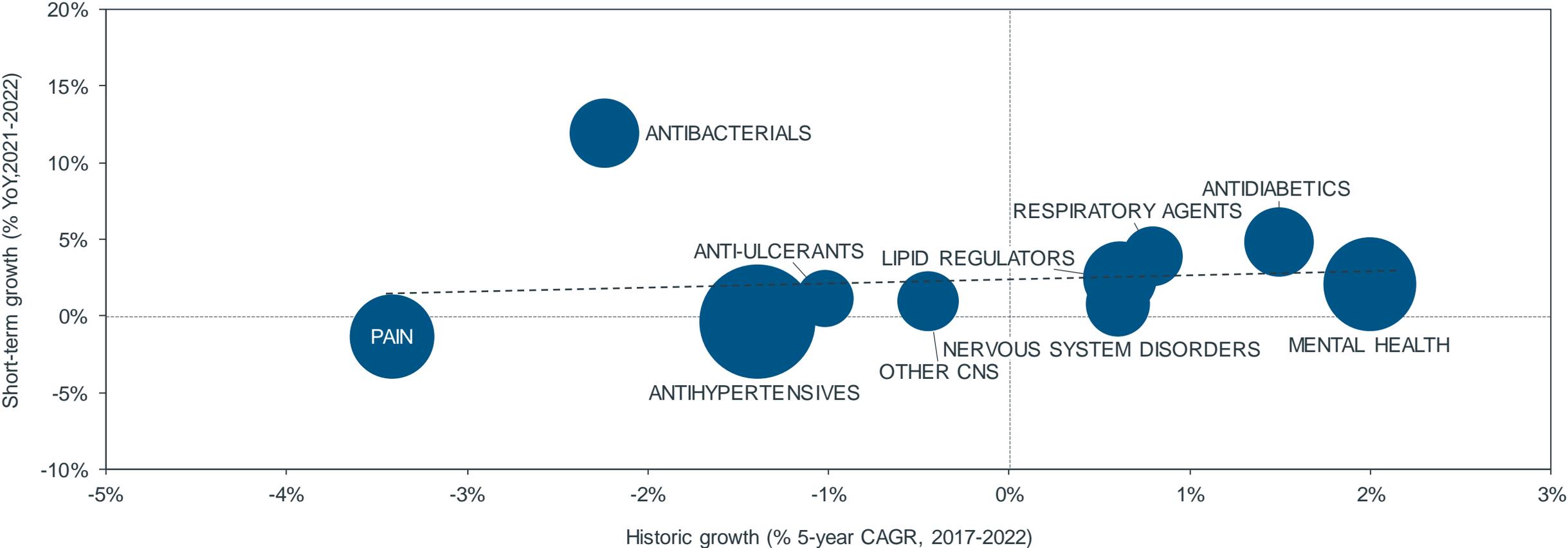


Source: IQVIA, National Sales Perspectives, Dec 2021

Generic Savings, 2015-2021

# On Rx's, Mental Health shows greatest 5-year growth; Antibacterials shows greatest year-over-year growth

Top 10 Therapy Area Growth on Rx's (unadjusted)



# On a script basis, the top 10 therapy areas are growing at 3.2% adjusted and at 1.9% unadjusted

Rank	Therapy Area	Adjusted Scripts (MNs)				Unadjusted Scripts (MNs)			
		MAT DEC 2022	Market Share	ABS Growth	Growth	MAT DEC 2022	Market Share	ABS Growth	Growth
1	<b>ANTIHYPERTENSIVES, PLAIN &amp; COMBO</b>	1,288.6	19.8%	22.3	1.8%	634.2	14.6%	-2.4	-0.4%
2	MENTAL HEALTH	632.9	9.7%	25.1	4.1%	420.1	9.7%	8.4	2.0%
3	LIPID REGULATORS	556.1	8.5%	25.2	4.8%	257.4	5.9%	6.1	2.4%
4	ANTIDIABETICS	403.9	6.2%	23.5	6.2%	230.5	5.3%	11.4	5.2%
5	PAIN	378.1	5.8%	-3.8	-1.0%	343.6	7.9%	-4.6	-1.3%
6	ANTI-ULCERANTS	273.1	4.2%	10.0	3.8%	154.8	3.6%	1.7	1.1%
7	NERVOUS SYSTEM DISORDERS	265.8	4.1%	4.9	1.9%	199.1	4.6%	1.5	0.8%
8	ANTIBACTERIALS	233.4	3.6%	24.7	11.8%	229.7	5.3%	24.5	12.0%
9	<b>THYROID ANTI-THYROID AND IODINE PREPS</b>	231.7	3.6%	1.3	0.5%	115.4	2.7%	-2.6	-2.2%
10	RESPIRATORY AGENTS	225.7	3.5%	7.5	3.5%	177.1	4.1%	6.6	3.9%
<b>TOP 10</b>		<b>4,489.3</b>	<b>68.9%</b>	<b>140.8</b>	<b>3.2%</b>	<b>2,762.0</b>	<b>63.8%</b>	<b>50.6</b>	<b>1.9%</b>

# On a script basis, the top 20 therapy areas are growing at 0.8% adjusted and declining at 1.4% unadjusted

Rank	Therapy Area	Adjusted Scripts (MNs)				Unadjusted Scripts (MNs)			
		MAT DEC 2022	Market Share	ABS Growth	Growth	MAT DEC 2022	Market Share	ABS Growth	Growth
11	OTHER CNS	194.4	3.0%	3.3	1.7%	174.2	4.0%	1.7	1.0%
12	VACCINES (PURE, COMB, OTHER)	156.7	2.4%	-117.6	-42.9%	155.2	3.6%	-119.0	-43.4%
13	DERMATOLOGICS	127.5	2.0%	4.7	3.9%	121.8	2.8%	4.2	3.6%
14	ANTITHROMBOTICS	123.5	1.9%	1.3	1.1%	73.1	1.7%	-0.2	-0.3%
15	ADHD	120.0	1.8%	8.1	7.3%	108.7	2.5%	7.3	7.2%
16	HORMONAL CONTRACEPTION, SYSTEMIC&TOPICAL	117.3	1.8%	-7.6	-6.1%	61.4	1.4%	-5.7	-8.5%
17	VITAMINS & MINERALS	105.8	1.6%	-3.0	-2.7%	62.4	1.4%	-3.3	-5.1%
18	BPH (BENIGN PROSTATIC HYPERTROPHY)	93.4	1.4%	4.9	5.5%	46.0	1.1%	1.4	3.1%
19	CORTICOSTEROIDS, PLAIN & COMBO	83.9	1.3%	8.0	10.6%	78.3	1.8%	7.9	11.3%
20	GI PRODUCTS	68.7	1.1%	3.1	4.7%	58.5	1.4%	2.2	4.0%
<b>TOP 20</b>		<b>5,680.5</b>	<b>87.2%</b>	<b>46.0</b>	<b>0.8%</b>	<b>3,701.5</b>	<b>85.5%</b>	<b>-52.8</b>	<b>-1.4%</b>

# 86.9% scripts for the top 10 therapy areas are dispensed as unbranded generics

Rank	Therapy Area	MAT December 2022 UNADJUSTED RX (MNs)				SHARE (%)		
		TOTAL RXs	BRAND	BRANDED GENERIC	UNBRANDED GENERIC	BRAND	BRANDED GENERIC	UNBRANDED GENERIC
1	ANTIHYPERTENSIVES, PLAIN & COMBO	634.2	6.3	1.4	626.5	1.0%	0.2%	98.8%
2	MENTAL HEALTH	420.1	12.9	0.1	407.1	3.1%	0.0%	96.9%
3	PAIN	343.6	2.4	2.9	338.4	0.7%	0.8%	98.5%
4	LIPID REGULATORS	257.4	3.9	0.2	253.3	1.5%	0.1%	98.4%
5	ANTIDIABETICS	230.0	109.4	1.5	119.1	47.6%	0.6%	51.8%
6	ANTIBACTERIALS	229.7	0.1	0.4	229.2	0.1%	0.2%	99.8%
7	NERVOUS SYSTEM DISORDERS	199.1	3.6	1.3	194.3	1.8%	0.7%	97.5%
8	RESPIRATORY AGENTS	177.1	52.3	9.4	115.3	29.5%	5.3%	65.1%
9	OTHER CNS	174.2	5.9	1.2	167.0	3.4%	0.7%	95.9%
10	VACCINES (PURE, COMB, OTHER)	155.2	155.2	0.0	0.0	100.0%	0.0%	0.0%
<b>TOP 10</b>		<b>2,820.6</b>	<b>352.0</b>	<b>18.4</b>	<b>2,450.2</b>	<b>12.5%</b>	<b>0.7%</b>	<b>86.9%</b>

Source: IQVIA, RxInsight, December 2022  
 Note: Unbranded Generic includes "Other" category  
 Limited to Rx and OTC Insulins  
 \*For Client's internal use only

# 85.4% scripts for the top 20 therapy areas are dispensed as unbranded generics

Rank	Therapy Area	MAT December 2022 UNADJUSTED RX (MNs)				SHARE (%)		
		TOTAL RXs	BRAND	BRANDED GENERIC	UNBRANDED GENERIC	BRAND	BRANDED GENERIC	UNBRANDED GENERIC
11	ANTI-ULCERANTS	154.8	1.6	0.1	153.1	1.1%	0.1%	98.9%
12	DERMATOLOGICS	121.8	3.5	6.8	111.5	2.9%	5.6%	91.6%
13	THYROID ANTI-THYROID AND IODINE PREPS	115.4	12.9	9.7	92.8	11.2%	8.4%	80.4%
14	ADHD	108.7	14.1	10.2	84.3	13.0%	9.4%	77.6%
15	CORTICOSTEROIDS, PLAIN & COMBO	78.3	0.1	0.1	78.1	0.2%	0.1%	99.7%
16	ANTITHROMBOTICS	73.1	40.8	0.8	31.4	55.9%	1.1%	43.0%
17	VITAMINS & MINERALS	62.4	0.0	5.7	56.8	0.0%	9.1%	90.9%
18	HORMONAL CONTRACEPTION, SYSTEMIC&TOPICAL	61.4	4.3	43.2	13.9	6.9%	70.4%	22.7%
19	GI PRODUCTS	58.5	6.6	8.3	43.6	11.3%	14.2%	74.5%
20	BPH (BENIGN PROSTATIC HYPERTROPHY)	46.0	0.0	0.0	45.9	0.1%	0.0%	99.9%
<b>TOP 20</b>		<b>3,701.0</b>	<b>436.0</b>	<b>103.3</b>	<b>3,161.6</b>	<b>11.8%</b>	<b>2.8%</b>	<b>85.4%</b>

Source: IQVIA, RxInsight, December 2022  
 Note: Unbranded Generic includes "Other" category  
 Limited to Rx and OTC Insulins  
 \*For Client's internal use only

# Pain has the highest annual branded generic and generic share of spend for the top 10 therapy areas

RANK*	THERAPY AREA	2017				MAT December 2022			
		BRAND	BRANDED GENERIC	UNBRANDED GENERIC	TOTAL \$ (BNs)	BRAND	BRANDED GENERIC	UNBRANDED GENERIC	TOTAL \$ (BNs)
1	IMMUNOLOGY	99.7%	0.2%	0.1%	10.3%	99.8%	0.2%	0.1%	17.2%
2	ANTIDIABETICS	95.7%	3.3%	1.0%	11.9%	96.6%	2.2%	1.3%	16.2%
3	ONCOLOGICS	94.1%	5.2%	0.7%	11.0%	96.6%	2.8%	0.6%	14.1%
4	RESPIRATORY AGENTS	84.4%	5.3%	10.2%	5.9%	84.6%	11.2%	4.2%	5.3%
5	ANTITHROMBOTICS	92.6%	7.1%	0.3%	3.0%	98.0%	1.9%	0.1%	4.8%
6	HIV ANTIVIRALS	99.3%	0.7%	0.0%	4.5%	99.4%	0.6%	0.0%	4.4%
7	MENTAL HEALTH	71.4%	27.9%	0.7%	3.5%	86.2%	12.5%	1.3%	3.1%
8	MULTIPLE SCLEROSIS	91.9%	0.3%	7.7%	4.1%	89.6%	2.5%	7.9%	2.6%
9	VACCINES (PURE, COMB, OTHER)	100.0%	0.0%	0.0%	2.3%	100.0%	0.0%	0.0%	2.4%
10	PAIN	30.4%	36.3%	33.3%	3.5%	27.7%	37.3%	35.0%	1.7%

Source: IQVIA, National Sales Perspectives, December 2022

Note: Unbranded Generic includes "Other" category

\*: Ranked on MAT December 2022\$ Limited to Rx and OTC Insulins

\*For Client's internal use only

# On a script basis, the top 10 products are growing at 3.8% adjusted and growing at 1.4% unadjusted

Rank	Product	Adjusted Scripts (MNs)				Unadjusted Scripts (MNs)			
		MAT DEC 2022	Market Share	ABS Growth	Growth	MAT DEC 2022	Market Share	ABS Growth	Growth
1	ATORVASTATINCA	274.8	4.2%	14.0	5.4%	128.9	3.0%	3.6	2.9%
2	AMLODIPINE BESY	189.1	2.9%	6.8	3.7%	91.1	2.1%	1.0	1.2%
3	LISINOPRIL	176.7	2.7%	-3.1	-1.7%	84.6	2.0%	-3.8	-4.3%
4	LEVOTHYROXINE SOD	166.7	2.6%	3.7	2.2%	83.2	1.9%	-0.2	-0.2%
5	LOSARTAN POT	132.3	2.0%	6.9	5.5%	62.4	1.4%	2.3	3.8%
6	METFORMIN HCL	114.3	1.8%	-0.3	-0.3%	56.6	1.3%	-1.6	-2.8%
7	METOPROLOL SUCCIN	110.3	1.7%	5.6	5.3%	52.4	1.2%	1.6	3.1%
8	ROSUVASTATINCAL	104.3	1.6%	17.2	19.7%	46.9	1.1%	6.8	16.9%
9	GABAPENTIN	97.2	1.5%	2.8	3.0%	72.2	1.7%	1.5	2.2%
10	HYDROCHLOROTHIAZIDE	95.0	1.5%	-0.4	-0.4%	44.1	1.0%	-1.5	-3.3%
<b>TOP 10</b>		<b>1,460.7</b>	<b>22.4%</b>	<b>53.1</b>	<b>3.8%</b>	<b>722.4</b>	<b>16.7%</b>	<b>9.7</b>	<b>1.4%</b>

# On a script basis, the top 20 products are declining at 0.6% adjusted and at 5.4% unadjusted

Rank	Product	Adjusted Scripts (MNs)				Unadjusted Scripts (MNs)			
		MAT DEC 2022	Market Share	ABS Growth	Growth	MAT DEC 2022	Market Share	ABS Growth	Growth
11	SERTRALINE HCL	87.6	1.3%	4.2	5.0%	55.0	1.3%	1.4	2.6%
12	OMEPRAZOLE (RX)	85.6	1.3%	-11.1	-11.5%	46.9	1.1%	-7.3	-13.5%
13	PANTOPRAZOLE SOD	83.9	1.3%	5.2	6.6%	47.2	1.1%	1.7	3.8%
14	ESCITALOPRAM OXAL	76.5	1.2%	5.4	7.6%	46.9	1.1%	2.0	4.5%
15	MONTELUKAST SOD	65.3	1.0%	0.5	0.8%	36.0	0.8%	-0.9	-2.5%
16	SIMVASTATIN	63.8	1.0%	-6.3	-8.9%	27.9	0.6%	-3.4	-10.8%
17	FUROSEMIDE	62.7	1.0%	-1.0	-1.6%	36.1	0.8%	-1.1	-3.0%
18	TAMSULOSIN HCL	60.7	0.9%	3.7	6.5%	30.8	0.7%	1.1	3.9%
19	TRAZODONE HCL	60.6	0.9%	3.2	5.6%	40.6	0.9%	1.3	3.4%
20	COMIRNATY	58.8	0.9%	-70.0	-54.3%	58.8	1.4%	-70.0	-54.4%
<b>TOP 20</b>		<b>2,166.0</b>	<b>33.3%</b>	<b>-13.1</b>	<b>-0.6%</b>	<b>1,148.6</b>	<b>26.5%</b>	<b>-65.4</b>	<b>-5.4%</b>

# On an unadjusted script basis, the top 10 corporations' growth is 2.1% and account for 40.7% market share

Rank	Corporation	Unadjusted Scripts (MNs)			
		MAT DEC 2022	Market Share	ABS Growth	Growth
1	TEVA PHARM USA	316.0	7.3%	4.0	1.3%
2	AUROBINDO PHARM	305.9	7.1%	-5.8	-1.9%
3	LUPIN	233.9	5.4%	9.6	4.3%
4	AMNEAL INC	166.4	3.8%	7.7	4.8%
5	ZYDUS PHARM	148.3	3.4%	0.1	0.0%
6	VIATRIS INC.	140.2	3.2%	-14.6	-9.4%
7	ACCORD HLTHCRE INC	132.7	3.1%	10.5	8.6%
8	CAMBER	111.4	2.6%	17.8	19.0%
9	ASCEND LABS	103.9	2.4%	4.7	4.7%
10	SANDOZ	103.0	2.4%	2.7	2.7%
<b>TOP 10</b>		<b>1,761.7</b>	<b>40.7%</b>	<b>36.5</b>	<b>2.1%</b>

# On an unadjusted script basis, the top 20 corporations' growth is declining at 0.6% and account for 60.9% market share

Rank	Corporation	Unadjusted Scripts (MNs)			
		MAT DEC 2022	Market Share	ABS Growth	Growth
11	SUN PHARMA	101.7	2.3%	2.2	2.2%
12	DR REDDY INC	100.5	2.3%	-0.4	-0.4%
13	CIPLA USA, INC.	95.0	2.2%	0.0	0.0%
14	APOTEX CORP	89.4	2.1%	-4.3	-4.6%
15	GLENMARK PHARMA	88.7	2.0%	7.8	9.7%
16	NORTHSTAR RX	88.4	2.0%	-1.8	-2.0%
17	HIKMA PHARM	86.2	2.0%	-3.4	-3.8%
18	RISING	81.7	1.9%	6.5	8.7%
19	PFIZER	77.1	1.8%	-61.9	-44.5%
20	TORRENT PHARM	69.2	1.6%	2.4	3.5%
<b>TOP 20</b>		<b>2,639.7</b>	<b>60.9%</b>	<b>-16.4</b>	<b>-0.6%</b>

# Camber has the highest absolute growth in total market unbranded generic corporation unadjusted Rx's

Top 10 Unbranded Generic Corporations by Absolute Growth  
MAT December 2022 (Unadj. Rx's in Millions)

## Unbranded Generic Corporations

Rank	Corporation	MAT Dec 2022 Unadj. Rx	Absolute Growth Unadj. Rx
1	CAMBER	111.4	17.8
2	ALEMBIC PHARM	33.5	12.9
3	ACCORD HLTHCRE INC	132.4	10.2
4	GRANULES PHARMA	37.2	9.5
5	PURACAP PHARMA	35.7	9.5
6	AMNEAL INC	162.2	8.5
7	LUPIN	226.4	8.5
8	XIROMED LLC	13.0	8.3
9	TEVA PHARM USA	292.4	7.9
10	GLENMARK PHARMA	86.0	7.3

Source: IQVIA, National Sales Perspectives, 2022

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# The top 10 generic products are declining at 1.7% and account for 1.3% market share on a non discounted spend basis

Rank	Product	Non-Discounted Spend (US\$ BNs)				
		MAT DEC 2022	Market Share	Generic Market Share	ABS Growth	Growth
1	ALBUTEROL HFA	\$1.3	0.2%	2.5%	-\$0.1	-5.7%
2	EPINEPHRINE	\$1.2	0.2%	2.2%	-\$0.1	-9.4%
3	GAMUNEX-C	\$1.1	0.2%	2.0%	\$0.0	-2.1%
4	SOFOSBUVIR/VELPATA	\$0.8	0.1%	1.5%	\$0.1	16.0%
5	LEVOTHYROXINE SOD	\$0.7	0.1%	1.4%	-\$0.1	-10.8%
6	MESALAMINE	\$0.7	0.1%	1.3%	\$0.0	-5.9%
7	BUPRENORPHIN/NALOX	\$0.6	0.1%	1.2%	\$0.0	-6.8%
8	BUDESONID/FORMOTER	\$0.6	0.1%	1.2%	\$0.0	-6.0%
9	ATORVASTATIN CA	\$0.6	0.1%	1.1%	\$0.2	42.9%
10	ENOXAPARIN SOD	\$0.5	0.1%	1.0%	\$0.0	2.6%
<b>TOP 10</b>		<b>\$8.3</b>	<b>1.3%</b>	<b>15.4%</b>	<b>-\$0.1</b>	<b>-1.7%</b>

# The top 20 generic products are growing at 10.5% and account for 1.9% market share

Rank	Product	MAT DEC 2022	Market Share	Generic Market Share	ABS Growth	Growth
11	VARENICLINE TART	\$0.5	0.1%	0.9%	\$0.3	200.1%
12	SOD CHLORIDE	\$0.4	0.1%	0.8%	\$0.1	26.1%
13	LENALIDOMIDE	\$0.4	0.1%	0.8%	\$0.0	0.0%
14	GABAPENTIN	\$0.3	0.1%	0.7%	\$0.0	-7.1%
15	INSULIN ASPART	\$0.3	0.1%	0.7%	\$0.1	48.4%
16	BUDESONIDE	\$0.3	0.1%	0.6%	\$0.0	13.7%
17	DEXLANSOPRAZOLE	\$0.3	0.1%	0.6%	\$0.0	0.0%
18	FLUTICASONE PROP/SAL	\$0.3	0.1%	0.6%	-\$0.1	-14.6%
19	LOSARTAN POT	\$0.3	0.1%	0.6%	\$0.1	41.3%
20	METOPROLOL SUCCIN	\$0.3	0.1%	0.6%	-\$0.1	-15.3%
<b>TOP 20</b>		<b>\$12.0</b>	<b>1.9%</b>	<b>22.3%</b>	<b>\$0.4</b>	<b>10.5%</b>

# The top 10 therapy areas have 3.6% share of unbranded generic sales

Rank	Therapy Area	MAT DEC 2022 NON-DISCOUNTED SPEND (\$BNS)				SHARE (%)		
		TOTAL SPEND	BRAND	BRANDED GENERIC	UNBRANDED GENERIC	BRAND	BRANDED GENERIC	UNBRANDED GENERIC
1	IMMUNOLOGY	\$109.3	\$109.0	\$0.1	\$0.2	99.8%	0.1%	0.2%
2	ANTIDIABETICS	\$102.5	\$99.1	\$1.3	\$2.2	96.6%	1.3%	2.2%
3	ONCOLOGICS	\$89.5	\$86.5	\$0.5	\$2.5	96.6%	0.6%	2.8%
4	RESPIRATORY AGENTS	\$33.6	\$28.4	\$1.4	\$3.8	84.6%	4.2%	11.2%
5	ANTITHROMBOTICS	\$30.5	\$29.9	\$0.0	\$0.6	98.0%	0.1%	1.9%
6	HIV ANTIVIRALS	\$27.7	\$27.5	\$0.0	\$0.2	99.4%	0.0%	0.6%
7	MENTAL HEALTH	\$19.8	\$17.0	\$0.3	\$2.5	86.2%	1.3%	12.5%
8	MULTIPLE SCLEROSIS	\$16.6	\$14.8	\$1.3	\$0.4	89.6%	7.9%	2.5%
9	VACCINES (PURE, COMB, OTHER)	\$15.3	\$15.3	\$0.0	\$0.0	100.0%	0.0%	0.0%
10	PAIN	\$10.8	\$3.0	\$3.8	\$4.0	27.7%	35.0%	37.3%
<b>TOP 10</b>		<b>\$455.6</b>	<b>\$430.6</b>	<b>\$8.7</b>	<b>\$16.3</b>	<b>94.5%</b>	<b>1.9%</b>	<b>3.6%</b>

Source: IQVIA, National Sales Perspectives, December 2022

Note: Unbranded Generic includes "Other" category

Limited to Rx and OTC Insulins

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# The top 20 therapy areas have 6.5% share of unbranded generic sales

Rank	Therapy Area	MAT DEC 2022 NON-DISCOUNTED SPEND (\$BNS)				SHARE (%)		
		TOTAL SPEND	BRAND	BRANDED GENERIC	UNBRANDED GENERIC	BRAND	BRANDED GENERIC	UNBRANDED GENERIC
11	ADHD	\$10.1	\$5.3	\$3.3	\$1.4	52.8%	33.3%	14.0%
12	GI PRODUCTS	\$9.4	\$6.6	\$1.1	\$1.8	70.1%	11.2%	18.7%
13	OTHER CNS	\$8.9	\$5.9	\$0.7	\$2.2	66.5%	8.3%	25.2%
14	ANTIHYPERTENSIVES, PLAIN & COMBO	\$8.9	\$5.1	\$0.1	\$3.6	57.6%	1.4%	41.1%
15	OTHER CARDIOVASCULARS	\$8.4	\$5.1	\$0.7	\$2.6	60.9%	8.4%	30.7%
16	NERVOUS SYSTEM DISORDERS	\$8.4	\$4.9	\$1.4	\$2.1	58.0%	16.5%	25.5%
17	MIGRAINE	\$8.1	\$7.7	\$0.1	\$0.3	95.4%	0.8%	3.8%
18	DERMATOLOGICS	\$6.2	\$2.0	\$1.9	\$2.2	33.1%	31.2%	35.8%
19	POLYVAL IMMUNOGLOBULINS IV & IM	\$5.9	\$1.1	\$4.8	\$1.1	1.4%	80.2%	18.4%
20	OPHTHALMOLOGY, GENERAL	\$5.8	\$1.3	\$3.3	\$1.2	22.4%	57.0%	20.7%
<b>TOP 20</b>		<b>\$535.6</b>	<b>\$474.6</b>	<b>\$26.1</b>	<b>\$34.9</b>	<b>88.6%</b>	<b>4.9%</b>	<b>6.5%</b>

Source: IQVIA, National Sales Perspectives, December 2022

Note: Unbranded Generic includes "Other" category

Limited to Rx and OTC Insulins

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# The top 10 generic corporations\* are declining at 4.5% and account for 41.0% generic market share

Rank	Corporation	Non-Discounted Spend (US\$ BNs)				
		MAT DEC 2022	Market Share	Generic Market Share	ABS Growth	Growth
1	TEVA PHARM USA	\$4.0	0.6%	7.5%		
2	VIATRIS INC.	\$3.8	0.6%	7.1%		
3	PRASCO LABS	\$2.1	0.3%	4.0%		
4	AMNEAL INC	\$2.1	0.3%	3.9%		
5	NOVARTIS	\$1.9	0.3%	3.6%		
6	HIKMA PHARM	\$1.7	0.3%	3.3%		
7	ENDO PHARM INC.	\$1.7	0.3%	3.1%		
8	APOTEX CORP	\$1.6	0.3%	3.1%		
9	SUN PHARMA	\$1.6	0.3%	3.0%		
10	ZYDUS PHARM	\$1.4	0.2%	2.6%		
<b>TOP 10</b>		<b>\$22.0</b>	<b>3.5%</b>	<b>41.0%</b>	<b>-\$1.0</b>	<b>-4.5%</b>

Source: IQVIA, National Sales Perspectives, December 2022; \*note: ranked on generic non-discounted spend Limited to Rx and OTC Insulins  
\*For Client's internal use only

# The top 20 generic corporations\* are declining at 5.9% and account for 61.1% generic market share

Rank	Corporation	Non-Discounted Spend (US\$ BNs)				
		MAT DEC 2022	Market Share	Generic Market Share	ABS Growth	Growth
11	DR REDDY INC	\$1.4	0.2%	2.6%		
12	AUROBINDO PHARM	\$1.3	0.2%	2.5%		
13	LUPIN	\$1.3	0.2%	2.4%		
14	FRESENIUS KABI	\$1.2	0.2%	2.2%		
15	GRIFOLS	\$1.1	0.2%	2.0%		
16	PFIZER	\$1.1	0.2%	2.0%		
17	PADAGIS LLC	\$0.9	0.1%	1.7%		
18	NORTHSTAR RX	\$0.9	0.1%	1.6%		
19	GILEAD SCIENCES,IN	\$0.9	0.1%	1.6%		
20	GLENMARK PHARMA	\$0.8	0.1%	1.6%		
<b>TOP 20</b>		<b>\$32.9</b>	<b>5.2%</b>	<b>61.1%</b>	<b>-\$2.1</b>	<b>-5.9%</b>

Source: IQVIA, National Sales Perspectives, December 2022; \*note: ranked on generic non-discounted spend Limited to Rx and OTC Insulins  
\*For Client's internal use only

# Aurobindo shows highest absolute growth in total market unbranded generic corporation sales on non discount spend

Top 10 Generic Corporations by Absolute Growth - MAT November 2022 (Sales \$ in Millions)

Ubranded Generic Corporations			
Rank	Corporation	MAT Nov 2022 \$	Absolute Growth \$
1	AUROBINDO PHARM	76.2	26.4
2	BRAINTREE LABS INC	34.2	21.4
3	CAMBER	49.4	19.3
4	ALVOGEN	24.6	18.9
5	ZYDUS PHARM	18.8	8.7
6	ASCEND LABS	63.6	6.7
7	AJANTA PHARMA USA	26.8	6.6
8	GRANULES PHARMA	6.5	6.4
9	AKORN CORP	44.3	6.2
10	CHARTWELL	5.5	5.2

Source: IQVIA, National Sales Perspectives, 2022

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# The impact of exclusivity losses will drop to \$56Bn over five years including significant biosimilars impact through the period

U.S. impact of brand losses of exclusivity 2017–2026, US\$Bn



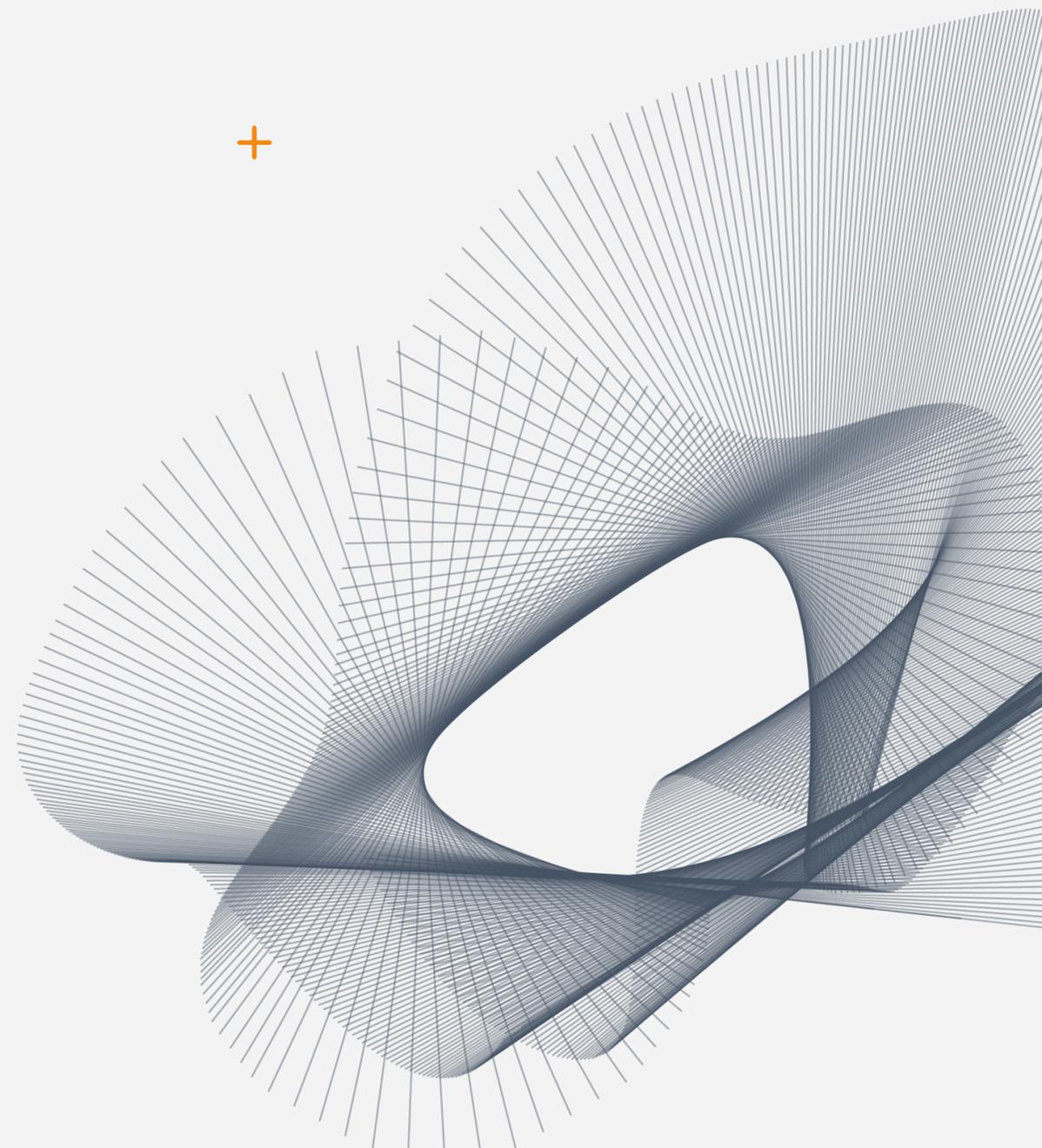
Source: IQVIA Market Prognosis, Sep 2021; IQVIA Institute, Mar 2022. The Use of Medicines in the U.S.: Usage and Spending Trends and Outlook to 2026. Report by the IQVIA Institute for Human Data Science. ©2022 IQVIA and Affiliates. Do not reproduce without permission.



# Biosimilars in the United States 2023-2027

COMPETITION, SAVINGS, AND SUITABILITY

JANUARY 2023

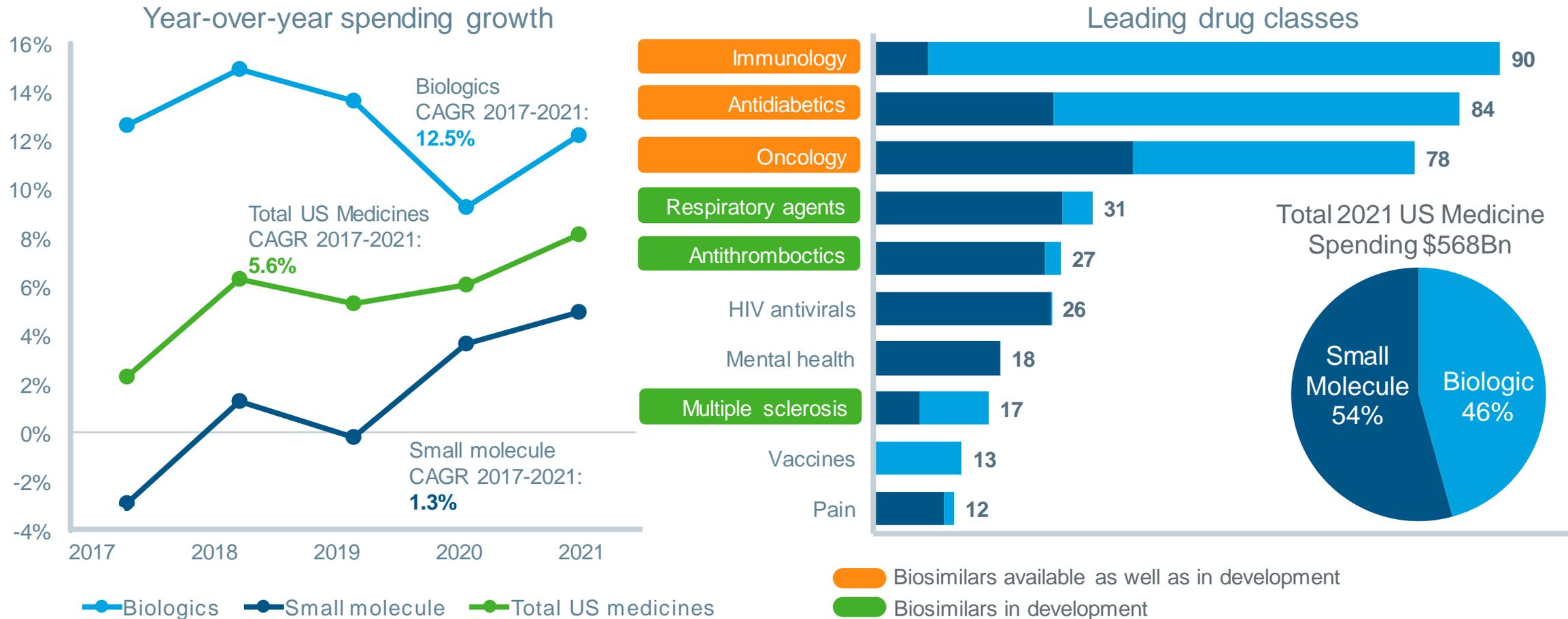




# Market dynamics and biosimilar development

# The U.S. biologics market continues to grow faster than non-biologics on an invoice-basis, and now comprises 46% of spending

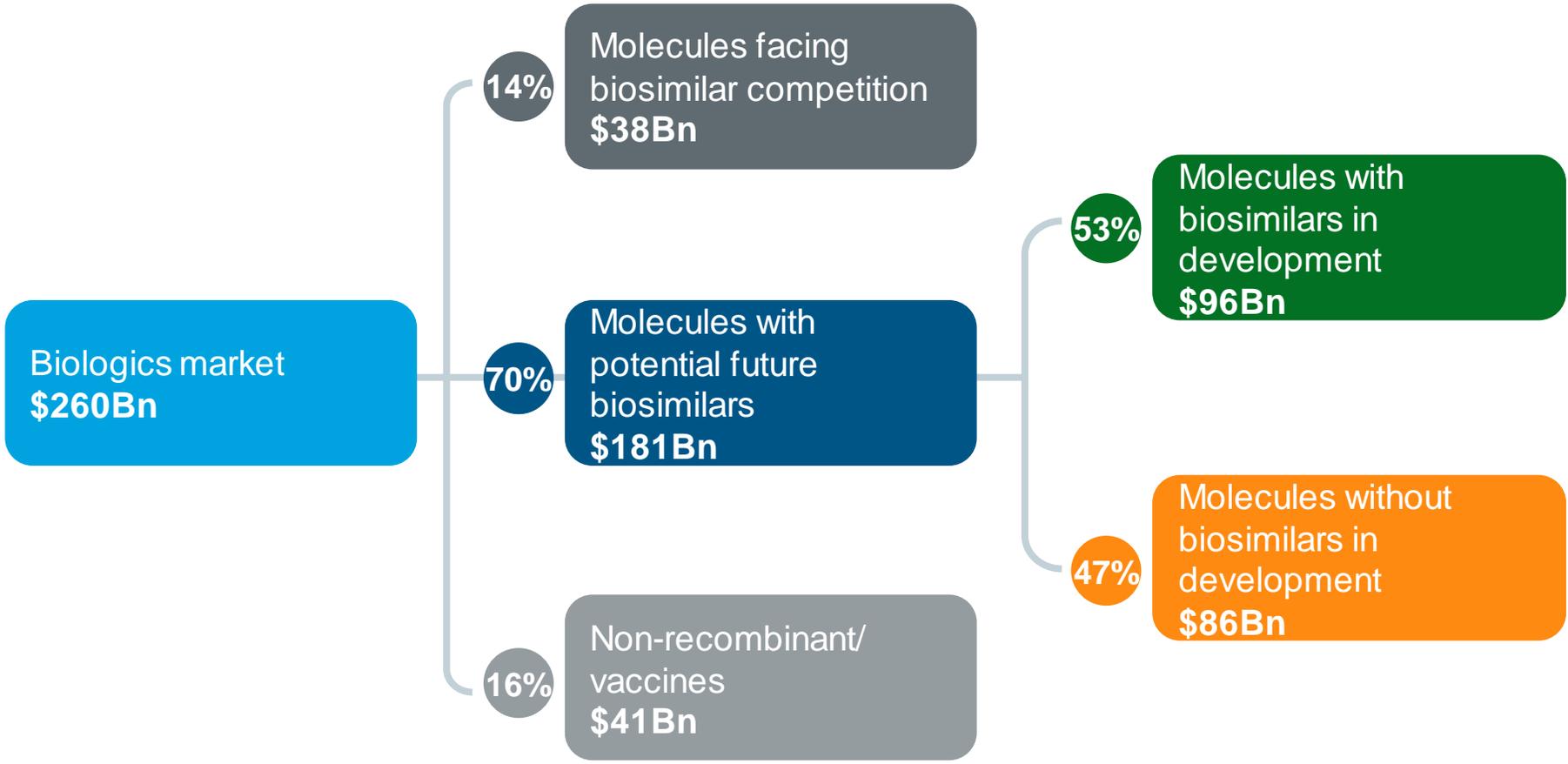
Total U.S. invoice spending growth by type and leading therapy areas by 2021 spending, US\$Bn



Source: IQVIA MIDAS, Dec 2021; IQVIA Institute, Nov 2022.  
 Biosimilars in the United States 2023-2027 – Competition, Savings and Sustainability. Report by the IQVIA Institute for Human Data Science.

# Molecules with biosimilars total \$38 billion of invoice spending, while biosimilar development is targeting a further \$96 billion

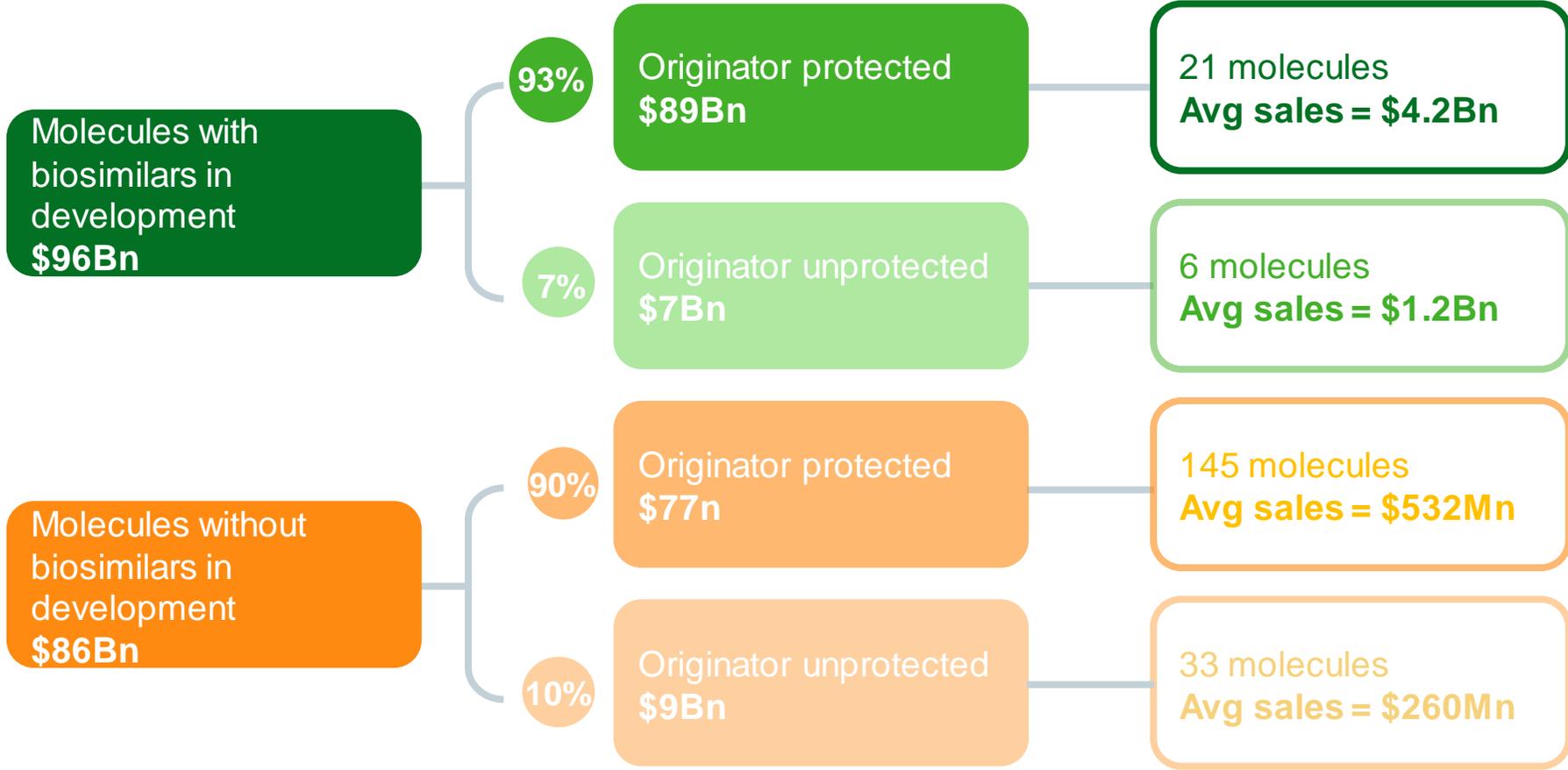
2021 biologics market segmented by status of biosimilar competition and biosimilar development



Source: IQVIA MIDAS, Dec 2021; IQVIA Pipeline Intelligence, IQVIA Institute, Nov 2022. Biosimilars in the United States 2023-2027 – Competition, Savings and Sustainability. Report by the IQVIA Institute for Human Data Science.

# Most of the molecules with biosimilars in development continue to be protected, with only 7% unprotected

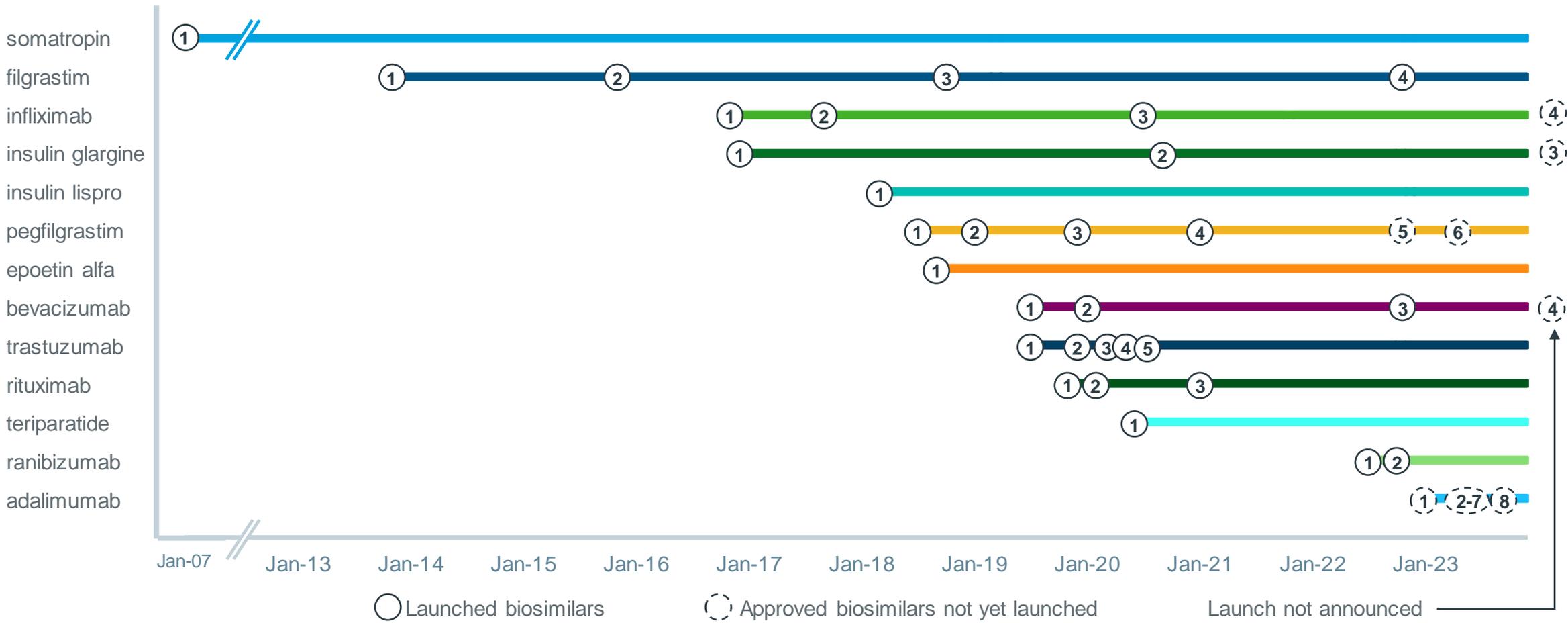
2021 biologics market segmented by status of biosimilar development and market exclusivity



Source: IQVIA MIDAS, Dec 2021; IQVIA Pipeline Intelligence, IQVIA Institute, Nov 2022. Biosimilars in the United States 2023-2027 – Competition, Savings and Sustainability. Report by the IQVIA Institute for Human Data Science.

# Since 2007, 30 biosimilars have launched in the U.S. with 10 more approved and set to launch by the end of 2023

*Biosimilars approved and launched in the U.S.*



Source: IQVIA Institute, Dec 2022. Biosimilars in the United States 2023-2027 – Competition, Savings and Sustainability. Report by the IQVIA Institute for Human Data Science.

# There are biosimilars approved or in clinical development in the U.S. for 20 additional molecules

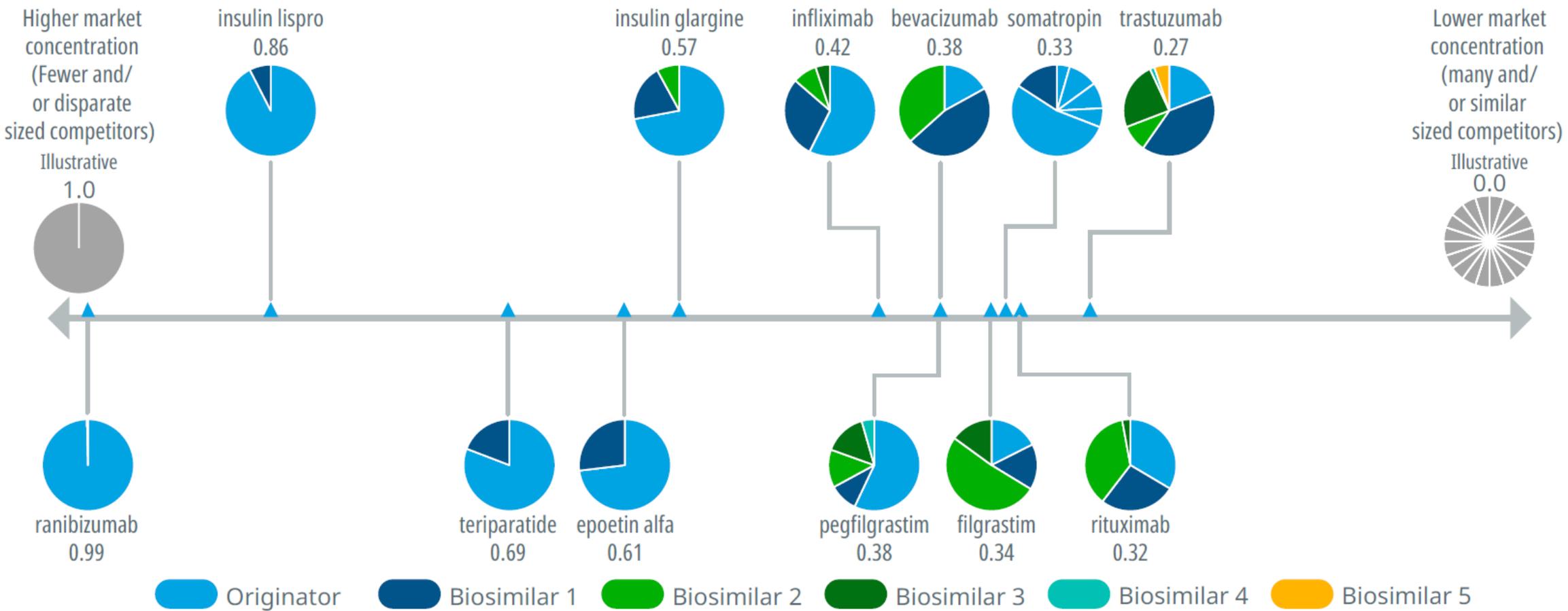
Cumulative molecule spending and approved, launched and pipeline biosimilar products for the molecule



Source: IQVIA MIDAS, Dec 2021; IQVIA Pipeline Intelligence, IQVIA Institute, Dec 2022.  
 Biosimilars in the United States 2023-2027 – Competition, Savings and Sustainability. Report by the IQVIA Institute for Human Data Science.

# For molecules facing biosimilars, competitiveness is highly varied but large share for later competitors is rare

Market concentration Herfindahl-Hirschman Index and shares by competitor Q3 2022

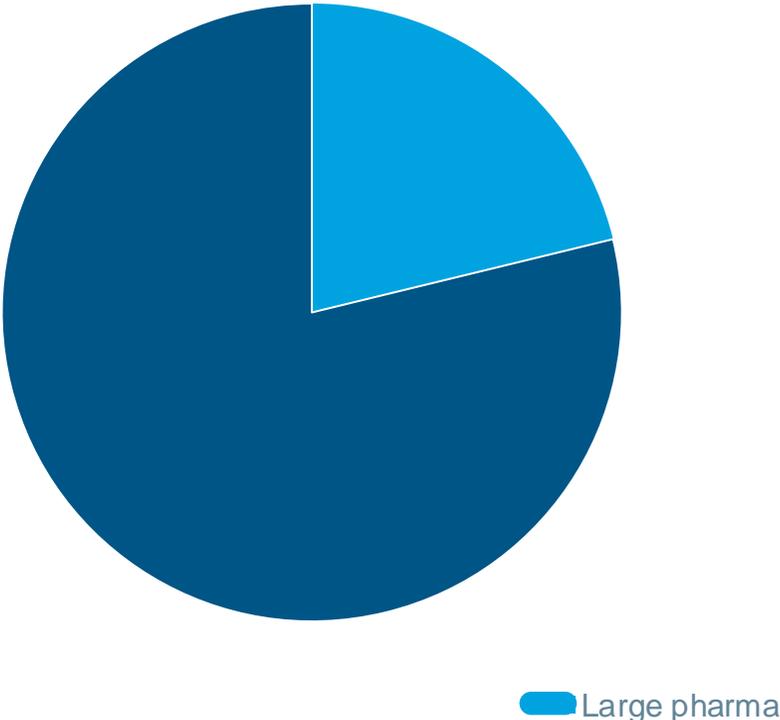


Source: IQVIA MIDAS, Sep 2022; IQVIA Institute, Dec 2022. Biosimilars in the United States 2023-2027 – Competition, Savings and Sustainability. Report by the IQVIA Institute for Human Data Science.

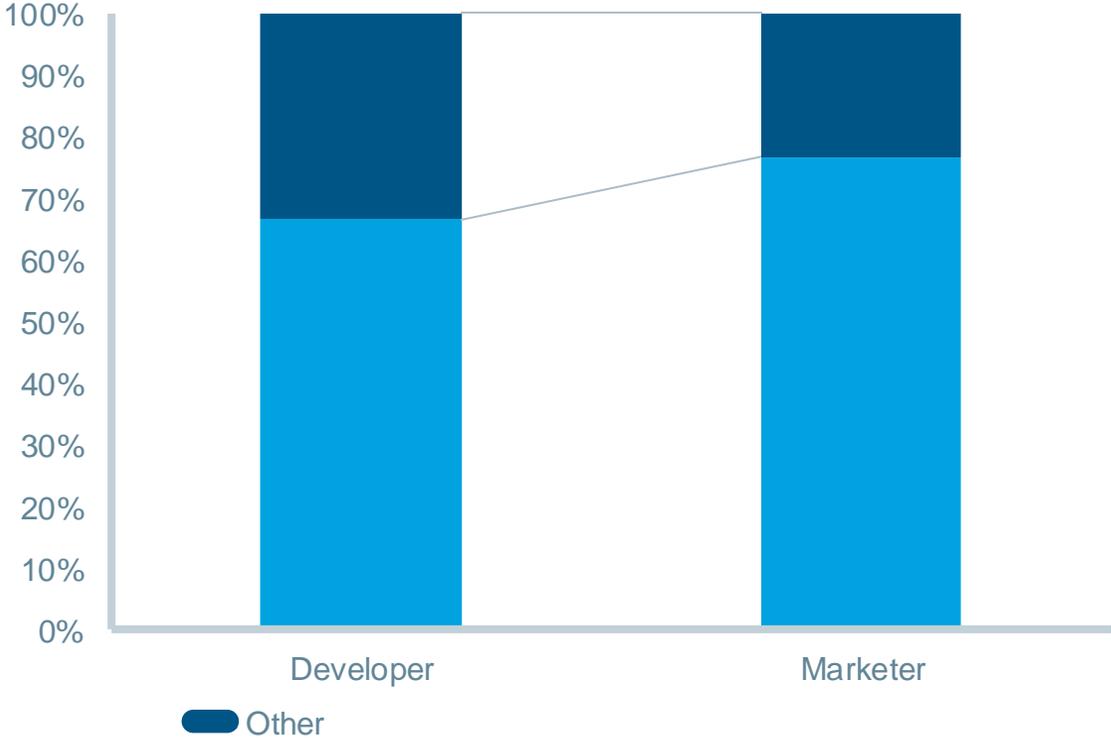
# Development of biosimilars is being driven by smaller companies, while marketing is done mostly by large companies

*Biosimilars in development and marketed in the U.S. by company type and size*

**Biosimilars in development**  
n = 118



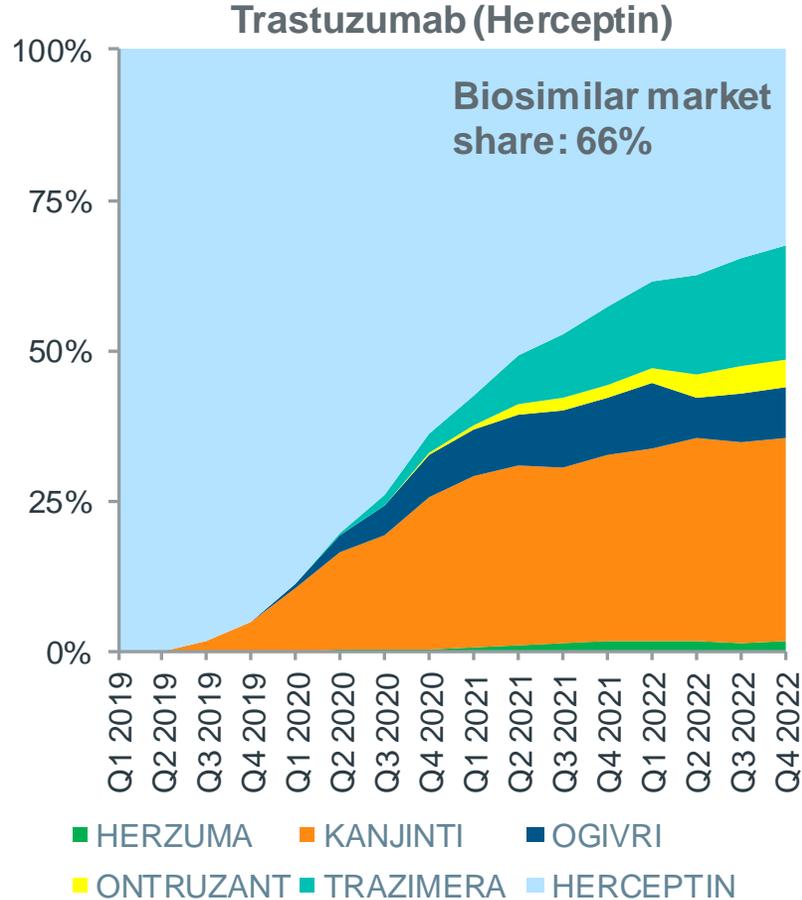
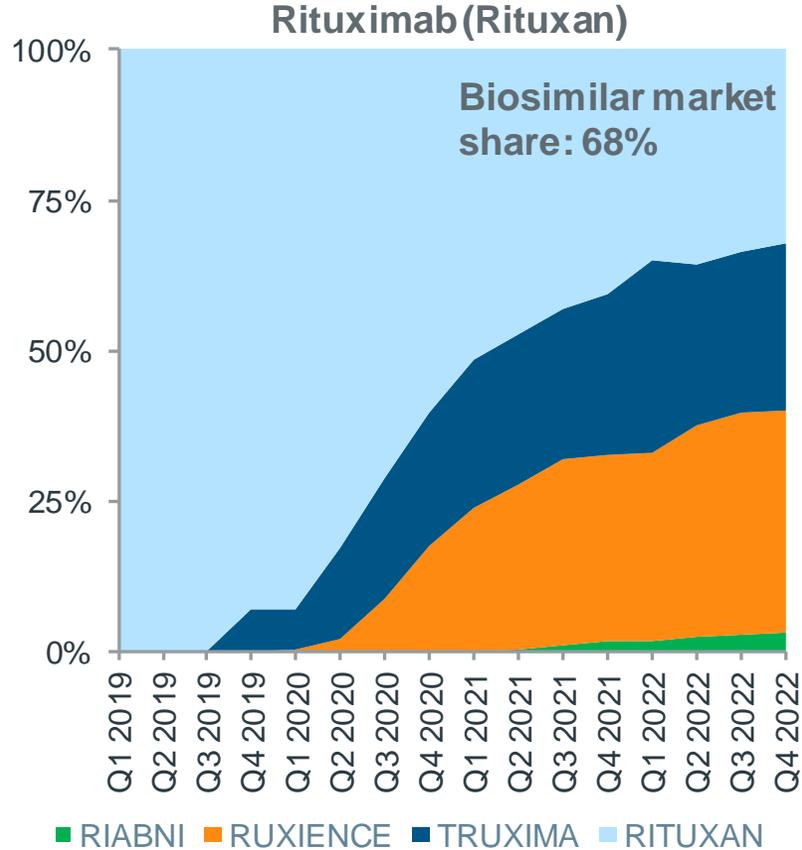
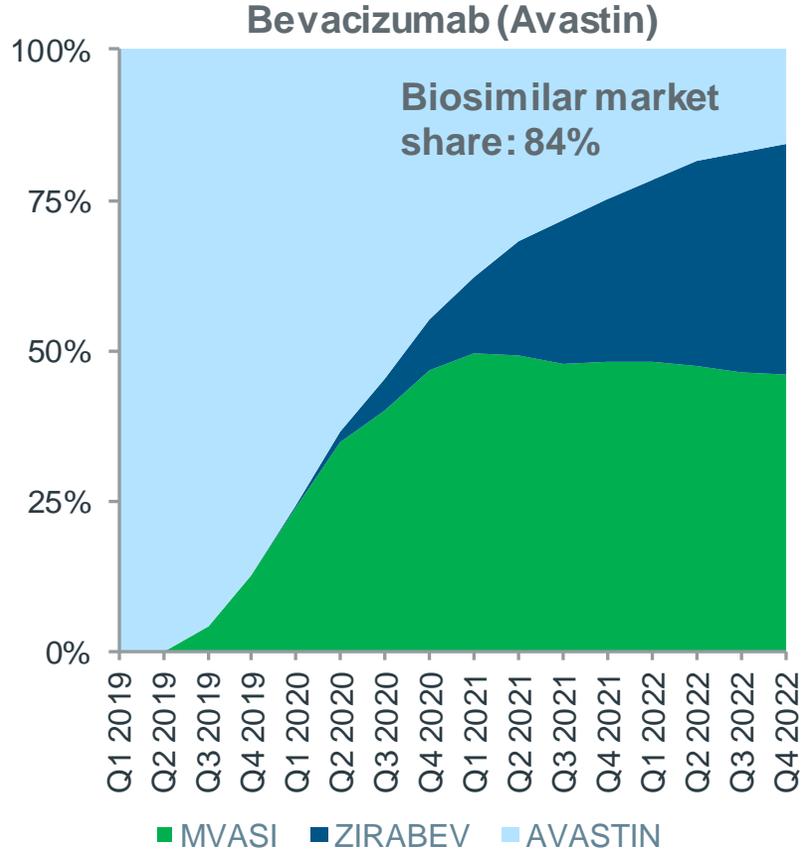
**Marketed biosimilars by company type and size**  
n = 30



Source: IQVIA Global Biosimilars Database, Sep 2022; IQVIA Institute, Nov 2022. Biosimilars in the United States 2023-2027 – Competition, Savings and Sustainability. Report by the IQVIA Institute for Human Data Science.

# In Oncology biosimilars market share ranges from 66% - 84%

US Biosimilar Market Share, % of Sales, Q2 2022

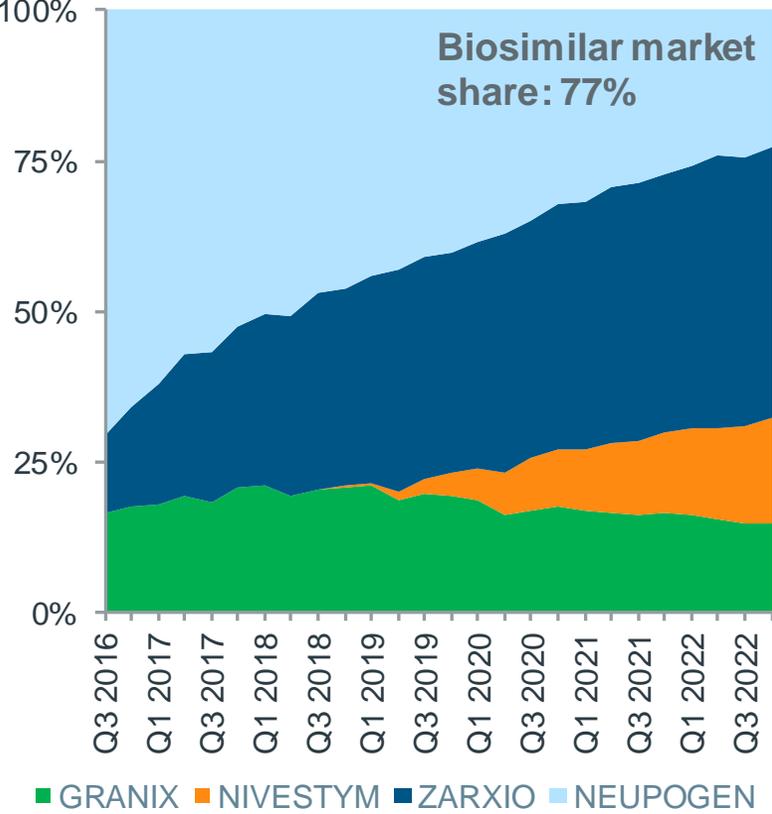


■ Originator

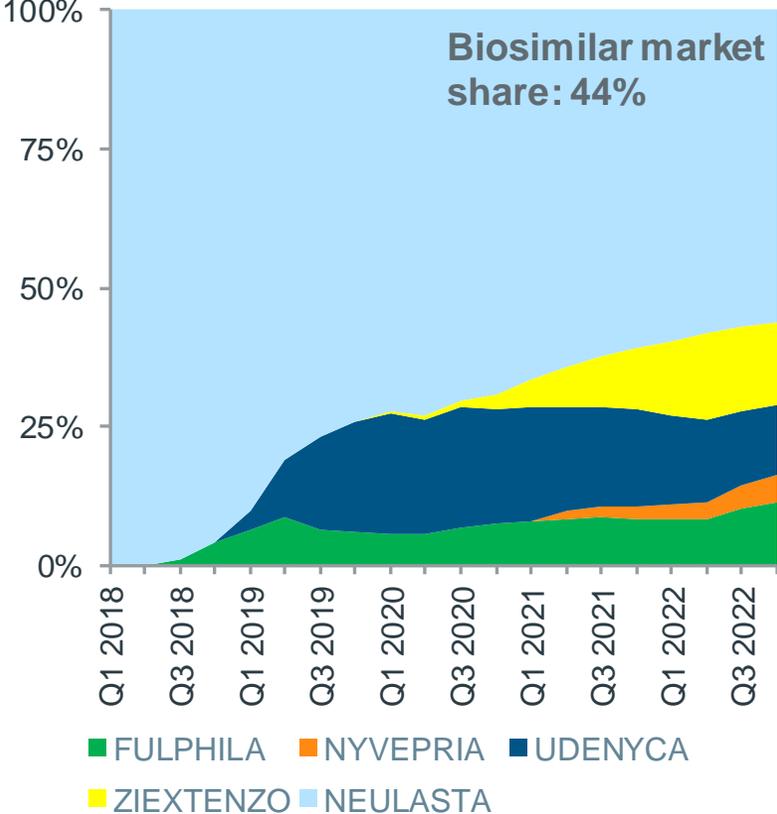
# Filgrastim's biosimilar has 77% market share

US Biosimilar Market Share, % of Sales, Q2 2022

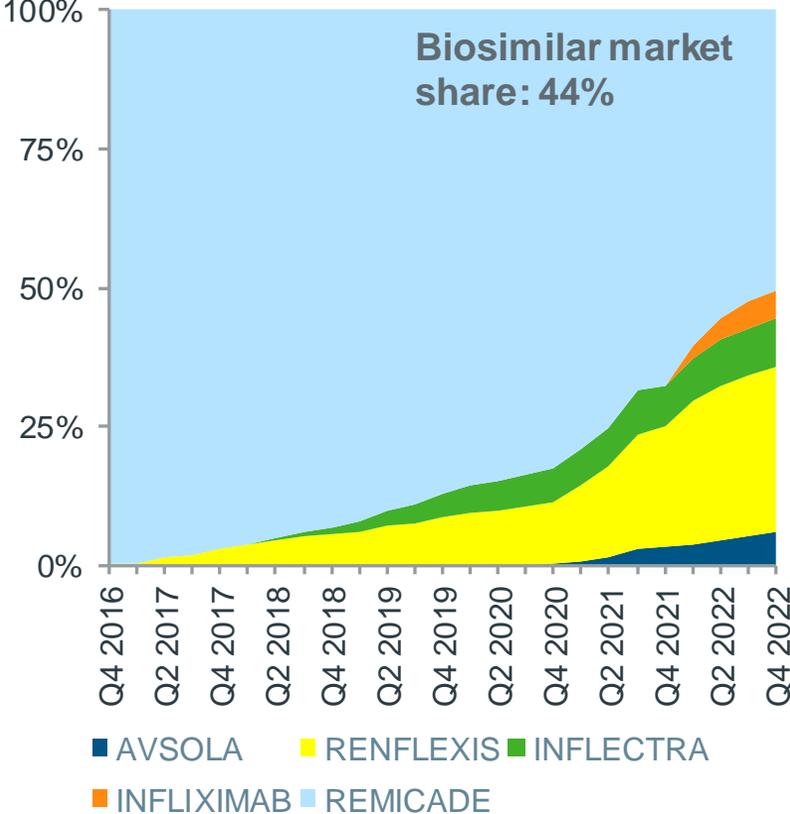
Filgrastim (Neupogen)



Pegfilgrastim (Neulasta)



Infliximab (Remicade)



■ Originator

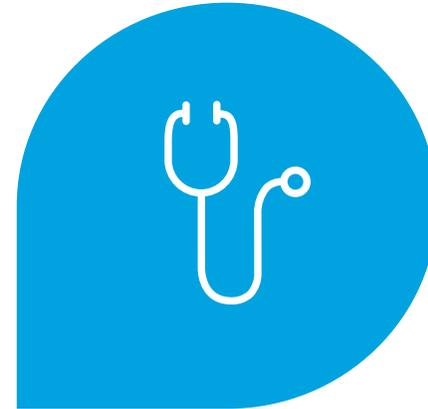
# Biosimilars will continue to impact all aspects of the healthcare system, with significant implications from upcoming events

*Key biosimilar implications for stakeholders across the healthcare system*

## Patients

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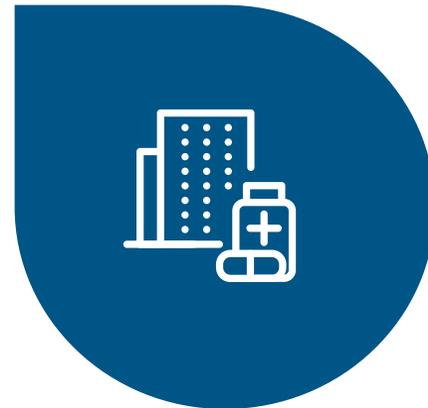
- Insurance coverage and out-of-pocket costs
- Treatment experience with existing therapies
- Recommendations from provider



## Providers

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- Patient stability and compliance with current therapy
- Likelihood of payer coverage for patient population
- Incentives for biosimilar prescribing



## Payers

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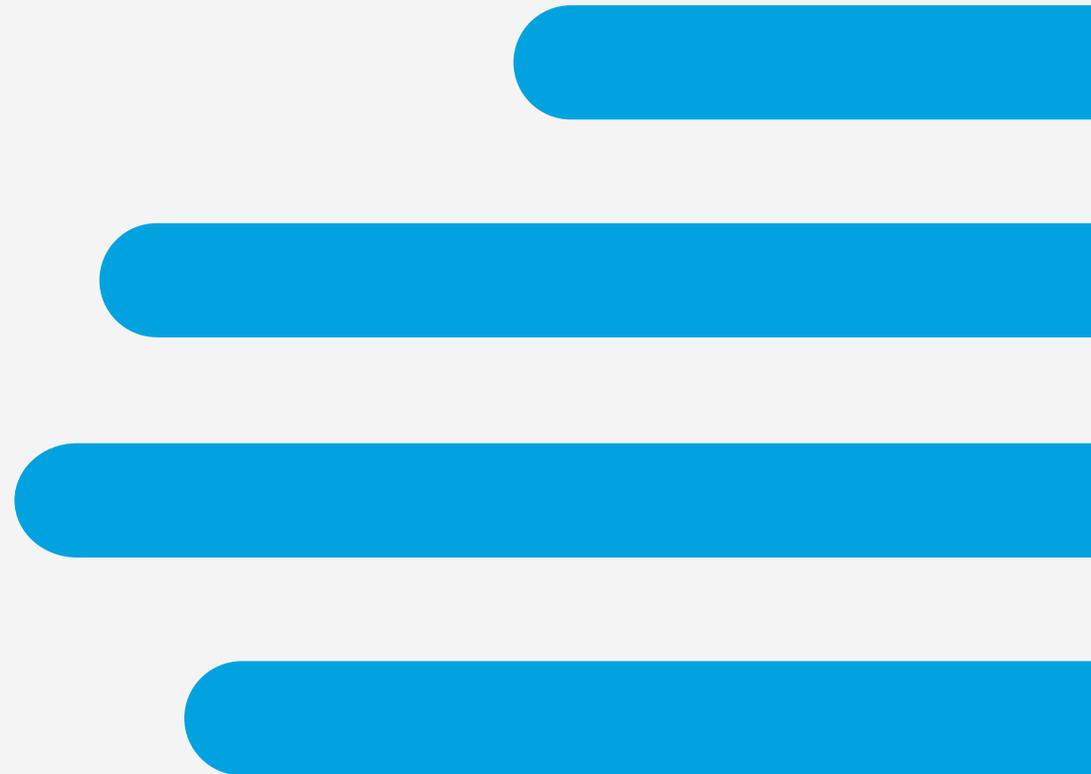
- Reimbursement decisions and formulary placement of biosimilars will impact uptake
- Interchangeability a relatively new aspect

## Biosimilar companies

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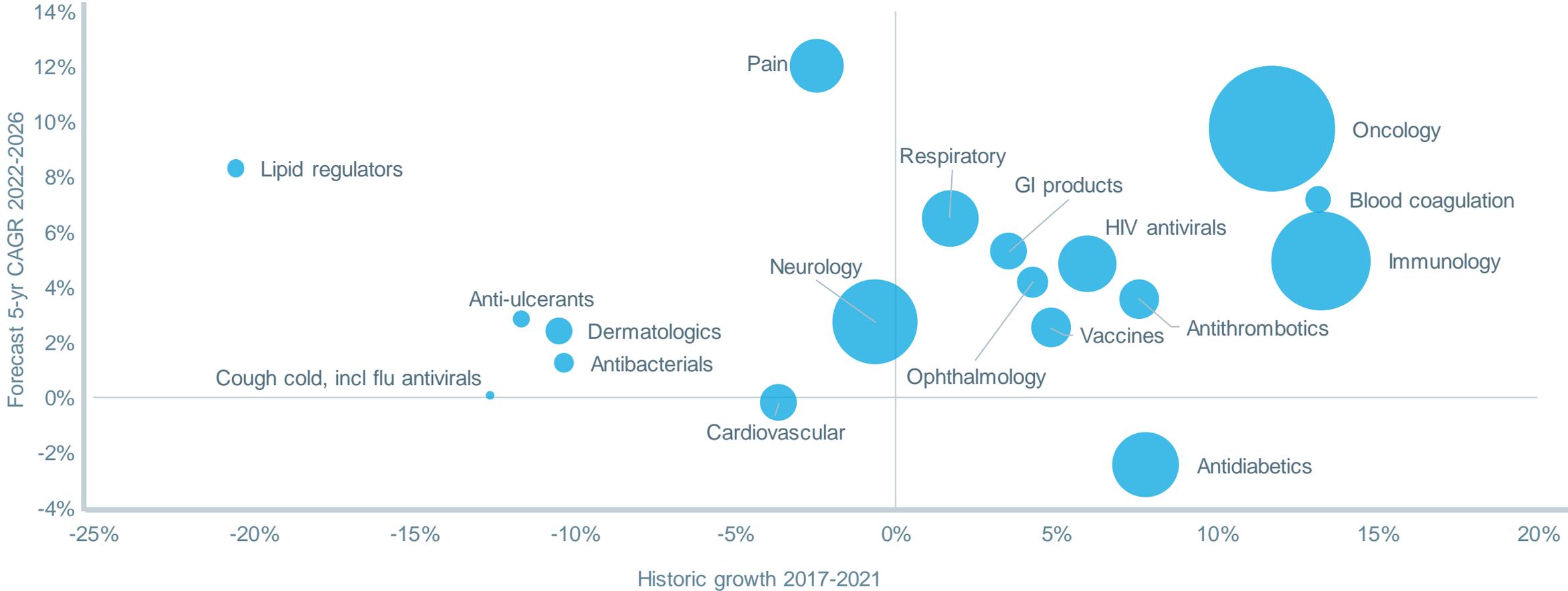
- Assessing viable opportunities for biosimilar development (i.e., ROI)
- Cost vs. benefit of interchangeability

# Outlook



# Immunology, oncology, neurology drive growth through 2026 along with COVID-19 vaccines

Historic and forecast net spending growth for leading therapy areas



Source: IQVIA Institute, Mar 2022.  
 The Use of Medicines in the U.S.: Usage and Spending Trends and Outlook to 2026. Report by the IQVIA Institute for Human Data Science.  
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# A quick recap

- COVID deaths and RSV, Cough, Cold Flu are on the decline
- Institutional claims are weak as are elective procedures
- Non retail and particularly hospitals and LTC bore the brunt of COVID
- Telehealth is about 7% of the claims
- Specialty is now 51% of the total market sales
- Unbranded generics are growing on prescriptions but continue to fall on Dollars
- Unbranded generic injectables have grown nicely until recently
- The Biosimilar wave is upon us with Humira now facing one competitor now with many more to come
- Most of the LOE opportunities will be in Biosimilars

# U.S Progress Point

<https://www.iqvia.com/progresspoint>

*A curation of IQVIA's best thinking on topics and trends driving change, disruption, and progress in the United States healthcare market.*



## Market insights

- The IQVIA U.S. Launch Quarterly
- The IQVIA Monthly Launch Tracker
- Pharmaceutical Market and MedTech Trends
- Next Generation Payor Segmentation



## Person-centric health

- Impact of Medicare Part D Cost Sharing
- Health Equity in the Time of COVID-19
- Advancing Outcomes with Home Healthcare



## Engagement innovation

- HCP Consent at Scale
- Hidden Peer-to-Peer Learning Communities
- Importance of End-to-End Data in Physician Marketing

# Thank you

## Disclaimer:

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Doug Long is Vice President of Industry Relations at IQVIA (formerly QuintilesIMS), the world's largest pharmaceutical information company. IQVIA offers services to the pharmaceutical industry in over 100 countries around the globe. Doug has been with IQVIA since 1989.

His fundamental task is to help secure data for all existing and new databases supported by IQVIA, manage supplier, manufacturer & association relationships, and develop information for data partners. As direct consequence of his involvement in these areas, Doug has considerable experience with, and a unique perspective on, the changing U.S. and global healthcare marketplace and pharmaceutical distribution.

Doug is a frequent industry speaker and the recipient of many awards from trade groups. Before joining IQVIA Doug held positions at Nielsen Market Research for 16 years in various sales and marketing capacities. A native of Illinois, Doug received a BA from DePauw University and holds an MBA in management from Fairleigh Dickinson University.

[doug.long@iqvia.com](mailto:doug.long@iqvia.com)

# APPENDIX



# IQVIA Definition of a Specialty Drug

Specialty drugs at IQVIA are classified as products that meet the following criteria



Treats chronic, rare and/or complex diseases



Expensive (USD \$6K annual cost of therapy)



Initiated and maintained by a specialist



Unique distribution



Generally injectable and/or not self-administered



Requires extensive or in-depth monitoring/patient counseling



Products that require an additional level of care in their chain of custody



Requires reimbursement assistance