

Humira survives competition from adalimumab biosimilars—for now

Market Trend Summary

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Humira biosimilars to disrupt the immune market in 2024-25

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Background

Seven years after Humira's key patent expired, nine biosimilars of adalimumab launched in the United States autoimmune market in 2023, starting with Amgen's Amjevita in January and followed by seven biosimilars in July and Pfizer's Abrilada in October. Several 40 mg pen versions of adalimumab biosimilars have the same high-concentration, citrate-free formulation as Humira Pen.

Wholesale acquisition cost (WAC) prices for biosimilar pen products are 5-90% lower than Humira Pen, reflecting a dual-pricing trend. Several biosimilars are priced at two different levels (WAC): a deeply discounted version (low WAC) for payers / PBMs that want an immediate discount and a high-priced version (high WAC) for payers / PBMs that want to use rebates to lower net pricing.

AbbVie says it signed contracts with many payers and PBMs to keep Humira on formulary at par with biosimilars through 2024. Most surveyed payers say contracts on Humira are in effect through 2025.

Early successes

Humira Pen (AbbVie): Humira Pen has the most extensive preferred tier level of coverage among adalimumab pen-based products in commercial plans nationally. It leads patient share among RA brands prescribed by surveyed rheumatologists and accounts for three-fourths of their patients on adalimumab.

Amjevita SureClick (Amgen): The low discounted, high WAC version has the second most extensive preferred tier level of coverage among the adalimumab products in commercial plans nationally, due mainly to large PBMs. It is the most prescribed of the biosimilars by surveyed rheumatologists next to Humira, an advantage due to six months of biosimilar exclusivity.

Cyltezo Pen (Boehringer Ingelheim): This version was the first to gain interchangeability status from the FDA. It is on the preferred tier of the largest PBM formularies and is the second most prescribed adalimumab biosimilar among surveyed rheumatologists.

Clarivate sources



Fingertip Formulary

Formulary status for adalimumab products in varying types of U.S. commercial plans covering 169.5 million members.



Primary research: rheumatologists

102 rheumatologists surveyed in September 2023 about their commercially insured rheumatoid arthritis patients. (Additional, limited results from gastroenterologists and dermatologists surveyed in March 2023 about psoriasis, ulcerative colitis, and Crohn's disease.)



Primary research: MCO directors

Pharmacy directors and medical directors from 41 managed care organizations surveyed in September 2023 about adalimumab coverage in their largest fully insured commercial plans.

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Open questions

Patient behavior:

Patients for whom it is working likely will remain on Humira until the out-of-pocket cost of a biosimilar is significantly lower than Humira. Will payers eventually place biosimilars on a cost-sharing tier that is lower than the preferred brand tier?

Physician behavior:

Rheumatologists expect to adopt adalimumab biosimilars more quickly than they did for biosimilars of infliximab (Remicade) because of their experience with biosimilars since 2016. How will they choose among the many adalimumab biosimilars, which have little differentiation except on price? Will Amjevita's lead among prescribers in 2023 give way to competitors as specialists become more familiar with them?

Payer behavior:

Most payers are reimbursing a limited number of adalimumab biosimilars and preferring two at the most on their formularies. By 2025, will Humira be covered less favorably than biosimilars and will Amjevita continue to have strong preferred tier coverage and shore up some share when biosimilars for Amgen's Enbrel enter?

Strategic implications

Given the trend of dual pricing for biosimilars, will rebate-driven pricing dominate favorable coverage, or will most payers favor the lowest list price version?

Will interchangeability be a major driver of coverage and uptake of biosimilars? Will physicians specify that Humira be dispensed to avoid automatic substitution with a biosimilar, and for how long?

Factors for consideration:



Pfizer's Abrilada is the second adalimumab biosimilar to be deemed interchangeable with Humira, and others are not far behind. While such a status may benefit a biosimilar, payers also consider other factors in biosimilar coverage, notably rebates and cost-effectiveness data.



Mark Cuban's Cost Plus Drug Co. is selling Yusimry (adalimumab-aqvh) directly to consumers at a 90% discount to Humira. The cost-plus pricing model is being floated in 2024/25 by two large PBMs, potentially disrupting traditional biosimilar dispensing.



With biosimilars of Stelara also poised to enter the immune market in 2025, payers may adopt a biosimilars-first strategy and subject other branded agents to step therapy or downgrade their coverage.

About the Author



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Clarivate coverage of rheumatoid arthritis and biosimilars

[Impacts of Biosimilar Adalimumab Launches in Autoimmune Disease](#) | Access & Reimbursement (published in December 2023)

[Rheumatoid Arthritis](#) Disease Landscape & Forecast (published in November 2023)

[Biosimilars | Access & Reimbursement](#) | Payer Insights | US/EU5 (published in July 2023)

Author bio

Ms. Lewis oversees Clarivate's U.S. Access & Reimbursement reports, including managing the primary research activities, reviewing content, and authoring select A&R reports on managed care trends. A Clarivate employee for 17 years, Ms. Lewis was a senior analyst who authored Health Plan Analysis reports and PBM profiles. She received her bachelor's degree from California State University in Sacramento.



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