

The impact of Humira biosimilars on the U.S. market

Webinar - 06.15.2023

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Agenda

The impact of Humira biosimilars on the U.S. market

On January 3, 2023, a key U.S. patent covering Humira (adalimumab), the world's best-selling drug, expired. The first biosimilar competitor, Amjevita, launched on day one following the expiry, and there are up to nine others waiting to enter the U.S. market. Having already seen the impact that adalimumab biosimilars have had on Humira sales since European expiry, this webinar will look at potential implications for both biologics and biosimilars developers in the U.S. market.

Looking at first quarter results, we will dive into the following questions:

- What impact is this going to have on the U.S. healthcare system?
- Will more patients benefit as a result, and will biosimilars save the system more money?
- What can be drawn from the European picture by looking at the erosion on AbbVie?
- What strategies are biosimilar companies introducing to capture market share?
- What is AbbVie having to do to protect its position?
- What can other biologics and biosimilars developers learn from this?
- How is this affecting clinician prescribing and switching behaviors?

Today's panelists

The impact of Humira biosimilars on the U.S. market

Host:



Michael Ward

Head of Thought Leadership,
Life Sciences and Healthcare,
Clarivate

Guest panelists:



William Soliman

Founder & CEO, Accreditation
Council for Medical Affairs
(ACMA)



Hamzah Aideed

Senior Manager, Healthcare
Research & Data Analytics,
Biosimilars, Clarivate



Questions?

- Use the chat feature
- Q&A will take place at the end of the webinar

Introductions

The impact of Humira biosimilars on the U.S. market

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Michael Ward

Head of Thought Leadership,
Life Sciences and Healthcare,
Clarivate

Guest panelists:



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Biosimilars, Clarivate

Entry order of Humira biosimilars in the United States

Up to 10 adalimumab biosimilars expected to launch in the U.S. in 2023

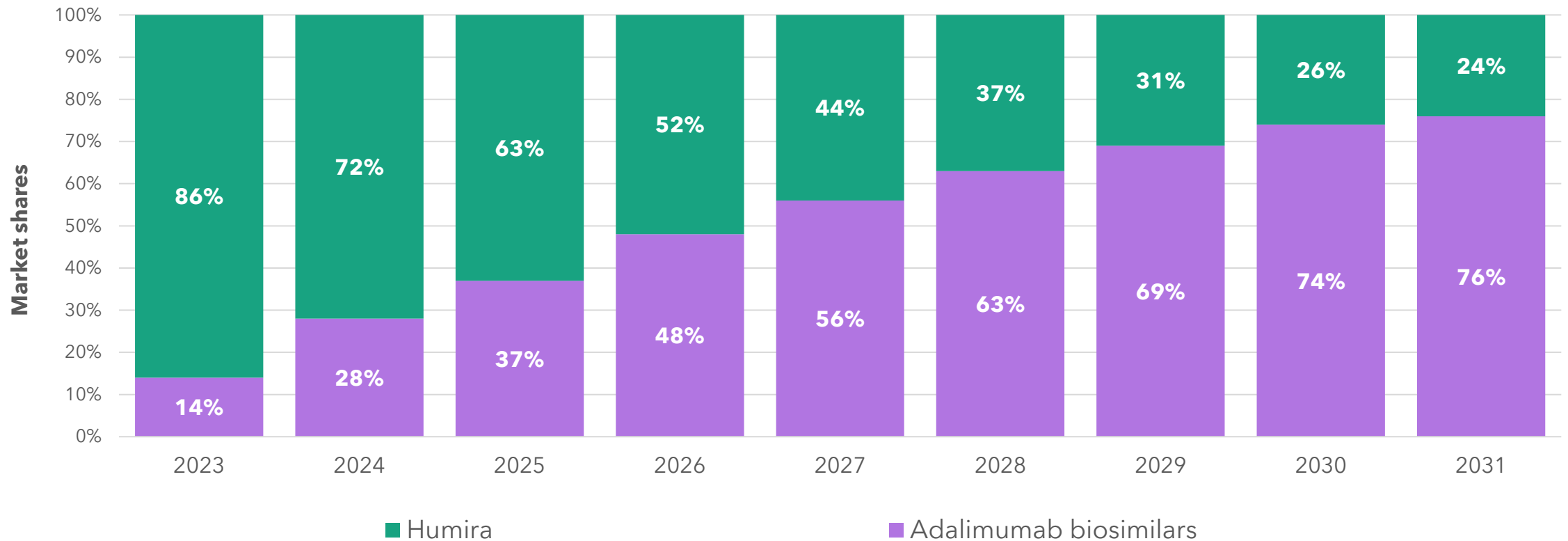
Brand	Company	FDA Approval	Expected Launch Date	Interchangeability Status	High/Low Concentration	Citrate Free	List Price Discount vs. Humira (WAC*)
Amjevita	Amgen	September 2016	Launched January 2023	No	Low; high concentration in Phase III trials	Yes	5% and 55% lower
Yusimry	Coherus Biosciences	December 2021	July 2023	No	Low	Yes	85% lower
Cyletezo	Boehringer Ingelheim	August 2017	July 2023	Yes	Low	Yes	TBC
Hadlima	Organon / Samsung Bioepis	July 2019	July 2023	No, but seeking status post launch	Both	Low concentration: no High concentration: yes	TBC
Hulio	Viartis / Biocon	July 2020	July 2023	Not currently, but undergoing interchangeability study	Low	Yes	TBC
Abrilada	Pfizer	November 2019	July 2023	Interchangeability application under FDA review	Low	Yes	TBC
Hyrimoz	Sandoz	October 2018	July 2023	No	Both	Low concentration: no High concentration: yes	TBC
Idacio	Fresenius Kabi	December 2022	July 2023	No	Low	Yes	TBC
Yuflyma	Celltrion	May 2023	July 2023	Not currently, but application filed for interchangeability study	High	Yes	TBC
AVT01	Alvotect / Teva Pharmaceuticals	Approval pending following FDA issuing CRL* in April 2023	H2 2023	Interchangeability application under FDA review	High	Yes	TBC

*Notes: CRL = complete response letter; WAC = wholesale acquisition cost

Humira market forecast

Biosimilars will not completely nullify Humira's market share long-term, with initial uptake expected to be modest.

Humira vs. adalimumab biosimilar market share in the United States: 2023-2031



Thank you for joining us.

Questions?

How can Clarivate help?

Disease Landscape & Forecast

Optimize your long-term disease market strategy with comprehensive market intelligence and takeaways.

- Hundreds of indications covered
- Integrated data powered by real world data, epidemiology and primary market research
- Identify and size smaller populations with rare disease visibility
- Disease-area expertise to unlock meaning behind data
- Answers at your finger tips through Clarivate Insights Platform

Biosimilars Insights

Size the opportunity in this rewarding market and evaluate the disruptive effects of biosimilars.

- 10 year forecast covering over 40 reference brands across G7
- Annual surveys of over 500 physicians across six specialties and in-depth interviews with payers from the U.S. and Europe
- Understand biosimilar regulations, pricing and reimbursement policies and the strategies in place to encourage biosimilar use
- Global pipeline analysis curated by biosimilar experts provide a clear view of the evolving competitive landscape