MARKET WATCH

Top product forecasts for 2020

One of the constants in the 8 years since Lipitor lost market exclusivity has been that Humira (adalimumab) will top any biggest-selling drug chart (TABLE 1). Indeed, such is Humira's supremacy that the anti-TNF monoclonal antibody is set to take Lipitor's crown as the industry's most successful drug, surpassing its cumulative sales this year. Much of this dominance has been not only through its success as a therapy for rheumatoid arthritis and other immune disorders, but also AbbVie's efforts to defend the patents of the product that still makes up almost two-thirds of its sales. This has meant that despite the approval of five biosimilars in the USA, none has yet launched. However, with US biosimilar sales expected in 2023, Humira's star is set to wane — albeit slowly.

Patent expiry concerns could also see others in this table slip down the rankings in the near future, with Revlimid (lenalidomide) facing its own generic entrants in 2022. However, the US$36.7 billion the drug is forecast to make between now and then will be some comfort to Bristol-Myers Squibb, who paid $74 billion to acquire Celgene last January.

Eylea (aflibercept) and Stelara (ustekinumab) will also be facing sales declines from 2023. However, Johnson & Johnson is doing its best to protect Stelara sales by expanding the drug's indication from psoriasis into Crohn's disease and ulcerative colitis. While Eylea biosimilars are expected in 2024 the drug might also cede sales to Novartis's new wet age-related macular degeneration product Beouv (brolucizumab), which has a more convenient 12-week dosing schedule. Novartis has also taken the bold decision to set up head-to-head trials in an attempt to take market share from Eylea.

In contrast to the products with imminent competition, a number of oncology drugs are forecast to grow strongly over the next 5 years, with Keytruda (pembrolizumab) potentially topping the list of biggest-selling drugs by 2024. The checkpoint inhibitor has bested rival PD-1 inhibitor Opdivo (nivolumab) in almost all settings. Much of its rapid growth has come from higher usage in first-line treatment of non-small-cell lung cancer, both as a monotherapy and in combination with chemotherapy. Its expansion into new indications and acceptance as standard of care in first-line treatment of non-small-cell lung cancer and advanced melanoma should help it maintain its impressive sales growth rate.

Credit: LENAIKA/Alamy Stock Photo

While the list highlights the triumph of immune checkpoint inhibition, the other big-selling oncology drug, BTK inhibitor Imbruvica (ibrutinib), has been widely credited with changing the leukaemia treatment landscape since its approval in 2013. However, with new concerns over cardiovascular and hypertension issues, the identification of patients who are resistant to Imbruvica through mutations and growing competition from other BTK inhibitors, its impressive sales growth rate could slow.

Outside of oncology, Bristol-Myers Squibb/Pfizer's anticoagulant Eliquis (apixaban) and Bayer/J&J's Xarelto (rivaroxaban) have had a historic rivalry to match that of Keytruda and Opdivo. Once again there is a clear winner; not only is Eliquis set to outsell Xarelto by more than $2 billion this year, if its forecast growth trajectory continues it will be the industry's second biggest drug by 2024, lagging only Keytruda.

The final product in this year's list, Gilead's Biktarvy (bictegravir, emtricitabine and tenofovir) for HIV infection, was a blockbuster in its first year of launch. Recent challenges to this three-drug regimen from GlaxoSmithKline and ViiV's doublet therapy Dovato (dolutegravir and lamivudine) have so far not amounted to much. And with its sales compound annual growth rate currently more than doubling, Biktarvy looks set to be a return visitor to the 2021 best-seller list.

Table 1 | **Top product forecasts for 2020**

Rank	Product	Company	Pharmacological class	2020 worldwide sales (US$ millions)
1	Humira	AbbVie/Eisai	Anti-TNF mAb	19,848
2	Keytruda	Merck & Co./Otsuka	Anti-PD1 mAb	14,367
3	Revlimid	Bristol-Myers Squibb/ Beigene	Immunomodulator	12,318
4	Eliquis	Bristol-Myers Squibb/Pfizer	Factor Xa inhibitor	8,966
5	Opdivo	Bristol-Myers Squibb/Ono Pharmaceutical	Anti-PD1 mAb	7,946
6	Eylea	Regeneron/Bayer/Santen Pharmaceutical	Anti-VEGF mAb	7,916
7	Stelara	Johnson & Johnson/ Mitsubishi Tanabe Pharma	Anti-IL-12/IL-23 mAb	7,241
8	Imbruvica	AbbVie/Johnson & Johnson	BTK inhibitor	6,818
9	Xarelto	Bayer/Johnson & Johnson	Factor Xa inhibitor	6,663
10	Biktarvy	Gilead Sciences	HIV INSTI/NRTI/NtRTI	6,306

BTK, Bruton tyrosine kinase; IL, interleukin; INSTI, integrase strand transfer inhibitor; mAb, monoclonal antibody; NRTI, nucleoside reverse transcriptase inhibitor; NtRTI, nucleotide reverse transcriptase inhibitor; PD1, programmed cell death protein 1; TNF, tumour necrosis factor; VEGF, vascular endothelial growth factor. Source: EvaluatePharma, December 2019.

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https://doi.org/10.1038/d41573-020-00011-5

Competing interests
The author declares no competing interests.