

# An anti-TNF



## TOP 5 AUTO-IMMUNE DRUGS BY US SALES

12 months to October 31 (% growth over previous 12 months)

**Humira**  
AbbVie  
\$5.4B (23.0%)

**Enbrel**  
Amgen  
\$4.7B (11.7%)

**Remicade**  
Janssen  
\$4.1B (9.0%)

**Orencia**  
BMS  
\$949M (21.4%)

**Stelara**  
Janssen  
\$905M (41.9%)

Source: IMS Health, IMS National Sales Perspectives and National Prescription Audit

**T**here are many reasons why the marketing folks behind AbbVie's autoimmune drug Humira have proved worthy of Marketing Team of the Year consideration. Despite a host of challengers, they've kept Humira atop the hotly competitive anti-TNF and broader autoimmune category. They've grown market share even as the brand nears the end of its product lifecycle. But perhaps their most notable feat is this: they've made it look easy.

In the first nine months of 2013, Humira (adalimumab) saw 20% growth in the US; on an annualized basis, that means AbbVie should have seen nearly \$1 billion in growth dollars last year in that market alone. Already the best-selling drug in the world, Humira appears poised to hold that global title through 2018, according to estimates by EvaluatePharma analysts. Did we mention that Evaluate made this prediction fully aware that Humira's patent expires in 2016?

Financial analysts also have a rosy view of the product's fortunes. "Prescribing patterns will likely remain sticky, while it will take time for more recent competitors to establish themselves. Real-world implications of modest share loss are likely to be more muted given pricing and pro-

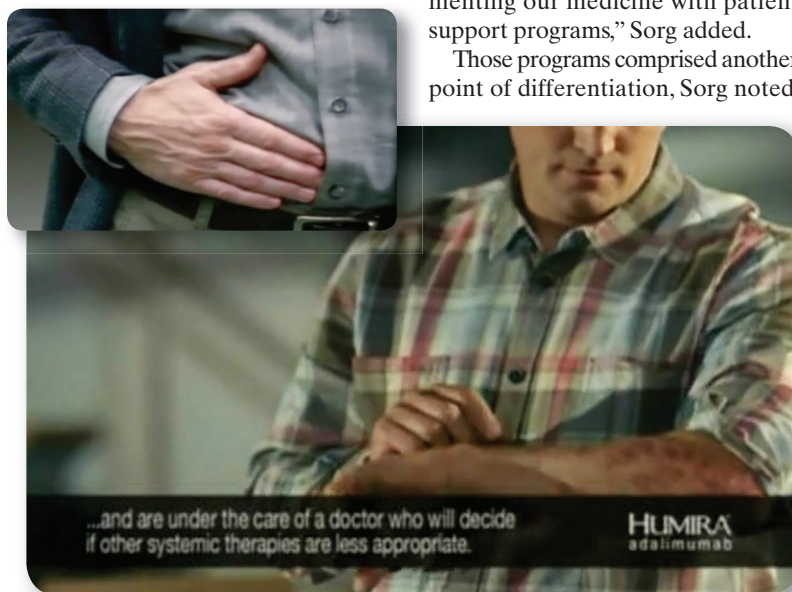
motion efforts," wrote Credit Suisse analyst Dr. Vamil Divan, in a note for the firm's Global Pharmaceuticals Survey Series on the rheumatoid arthritis market.

The Humira team merits praise for the skill with which they've articulated—and leveraged—its value proposition. As opposed to Amgen's Enbrel, Janssen's Remicade and others in the category, Humira works across the joints, skin and gut. That likely goes a long way toward explaining why

questions. "Humira is the only biologic with such breadth of indications."

As for that pivotal distinction, the brand team successfully communicated it to all corners of the marketplace, spending \$198 million on consumer and \$3.7 million on journal advertising, according to 2012 data from Nielsen and Kantar Media. "We are focused on ensuring that healthcare providers recognize the autoimmune patients for whom Humira treatment may be appropriate and we are augmenting our medicine with patient support programs," Sorg added.

Those programs comprised another point of differentiation, Sorg noted.



**Above:** TV spots aimed at Crohn's (inset) and psoriasis. **Left:** Duffey and Stenhouse flank (L-R) James Salanty, VP, US rheumatology, Elaine Sorg, VP, US immunology, and Matthew Widman, head, US immunology, AbbVie.

Humira has sustained growth as it enters the final years of its product life.

"Biologics like Humira are complex medicines for serious autoimmune conditions, and Humira offers significant therapeutic value to patients, healthcare providers and payers across seven indications in the US," said Elaine Sorg, VP, US immunology at AbbVie, in response to emailed

"We've always been highly focused on patients and that—along with our long-term data, safety profile and clinical experience—are some of the many aspects that differentiate Humira." When it comes to the evolution of the brand team's DTC and professional messaging, however, Sorg doesn't give much of a preview for what lies ahead.

"Like with most medicines, our

# juggernaut

DTC has traditionally focused on educating patients about their disease and at the same time encouraging them to talk with their physician about treatment options,” she said. “We will continue to evolve our message based on Humira’s indications and the needs of patients and healthcare professionals.”

Given the patent expiration and more competition in the autoimmune space — Pfizer’s RA pill Xeljanz has arrived, to be followed by biosimilars — the Humira brand team seems to have its work cut out for it. But Sorg believes that, with help from an ever-expanding list of indications, the latest being ulcerative colitis, it’s well positioned: “The autoimmune market will continue to evolve and we anticipate Humira will remain a strong, sustainable growth brand.” — *Larry Dobrow*



L-R: John Duffey, VP, US dermatology, and Mark Stenhouse, VP, US gastroenterology, AbbVie.