

2013 Statistics for Global Prescription Medications: CNS Therapeutics Maintain a Leading Position among Small Molecule Therapeutics

IMS Health recently released top-line market data on the top global prescription drugs in 2013, and once again, we are summarizing the key data.^{1–5} In spite of all the negative press regarding prescription drug sales, 2013 witnessed an 4.5% growth (\$874.6 billion) over 2012 sales (\$857.1 billion). Unlike the dramatic change in leading medications between 2011 and 2012, the 2013 list of top products was relatively unchanged since 2012. Once again, half of the top 10 global prescription drugs are biologics (Table 1), but of the top five small molecule

Table 1. Top 20 Global Prescription Drugs in Terms of Sales in 2013¹

rank	product	sales (US\$Bn)
1	Humira	9.85
2	Seretide	9.21
3	Crestor	8.14
4	Enbrel	7.94
5	Lantus	7.93
6	Nexium	7.86
7	Abilify	7.83
8	Remicade	7.67
9	Cymbalta	6.46
10	MabThera	6.26
11	Avastin	5.71
12	Spiriva	5.31
13	Herceptin	5.17
14	Lyrica	5.12
15	Copaxone	4.69
16	Januvia	4.46
17	Lucentis	4.41
18	Neulasta	4.40
19	Glivec	4.13
20	Atripla	4.01

drugs, two are CNS. AbbVie's Humira (monoclonal antibody for TNF α) was the top global product of 2013, with global sales of \$9.8 billion (an 18.5% increase over 2012). The next two top spots were taken by small molecules: the asthma/COPD therapeutic Seretide (\$9.2 billion, 4.5% growth over 2012) and the statin Crestor (\$8.1 billion, 1.5% growth over 2012). Amgen's Enbrel (monoclonal antibody for TNF α , \$7.9 billion) and Sanofi-Aventis' Lantus (insulin glargine, \$7.9 billion, reflecting a 23.3% increase over 2012) rounded out the top 5. The proton pump (H⁺/K⁺ ATPase) inhibitor Nexium (\$7.8 billion, increased 7% over 2012) came in at number 6, and the anti-psychotic Abilify landed at number 7 (\$7.8 billion, increased 14.6% over 2012), which faces patent expirations starting in 2015. Johnson & Johnson/Merck's Remicade (monoclonal antibody for TNF α number 8, \$7.6 billion), Eli Lilly's SNRI antidepressant Cymbalta ranks number 9 (\$6.4 billion, 13.6% growth over 2012), and IDEC's MabThera (a chimeric monoclonal antibody against CD20) rounded out the top 10 with sales of \$6.2 billion.¹

The top therapeutic classes, by spending in 2013, were comparable to those from 2012 (Table 2).^{1,2} Last year,

Table 2. Top 10 Global Therapeutic Classes in 2013 in terms of Spending/Sales¹

rank	therapeutic class	sales (US\$Bn)	% growth
1	oncologics	67.1	+8.5
2	pain	57.2	+4.7
3	antidiabetics	54.3	+10.2
4	antihypertensives	49.6	-1.7
5	antibacterials	40.2	+2.6
6	mental health	39.4	-2.6
7	respiratory agents	38.1	-1.8
8	autoimmune disorders	31.8	+14.4
9	lipid regulators	28.9	-10.8
10	dermatologics	26.6	+11.3

oncology ranked number one, with global sales of \$67.1 billion, followed by pain (\$57.2 billion), antidiabetic (\$54.3 billion), antihypertensives (\$49.6 billion), antibacterial (\$40.2 billion), and mental health (\$39.4 billion). Overall, CNS held two of the top 10 positions: pain (number 2) and mental health (number 6). In 2013, growth was modest, with many areas, such as mental health, showing a net loss (-2.6%). However, antidiabetics and autoimmune diseases displayed robust increases, 10.2% and 14.4%, respectively. Once again, lipid regulators shouldered the greatest loss (-10.8%), largely due to the continued impact of other statin patent expirations. In terms of the top 20 classes, nervous system disorders ranked number 16 (\$20.7 billion, 10.1% increase) and other CNS fell to number 17 (\$18.5 billion, 6.4% increase). Thus, in the top 20 global therapy areas, CNS held four spots totaling over \$135.4 billion in global sales (or 15.5% of the total global sales).¹

Due to patent expirations that impacted 2013 pharmaceutical sales globally, the rankings of the top pharmaceutical companies was essentially the same in 2013 as they were in 2012, albeit with minor juxtapositions (Table 3). Once again, Novartis captured the top position with sales of \$50 billion, followed by Pfizer (\$44.3 billion), Sanofi-Aventis (\$38.1 billion), Merck & Co. (\$36.3 billion), Roche (\$36.1 billion), GlaxoSmithKline (\$32.5 billion), Johnson & Johnson (\$30.7 billion), AstraZeneca (\$30.2 billion), Teva (\$24.2 billion), and Eli Lilly (\$23.0 billion).¹

Overall, CNS drugs performed exceptionally well in 2013, holding two spots in the global top 10 pharmaceutical products, and representing two of only five small molecule therapeutics in the top 10, as well as two of the top 10 therapeutic classes. Generic competition and patent expirations had a major impact on the top prescription drugs in 2013. Moreover, biologics once again held five of the top 10 spots. With more patent expirations looming in 2014/2015 for top selling drugs,

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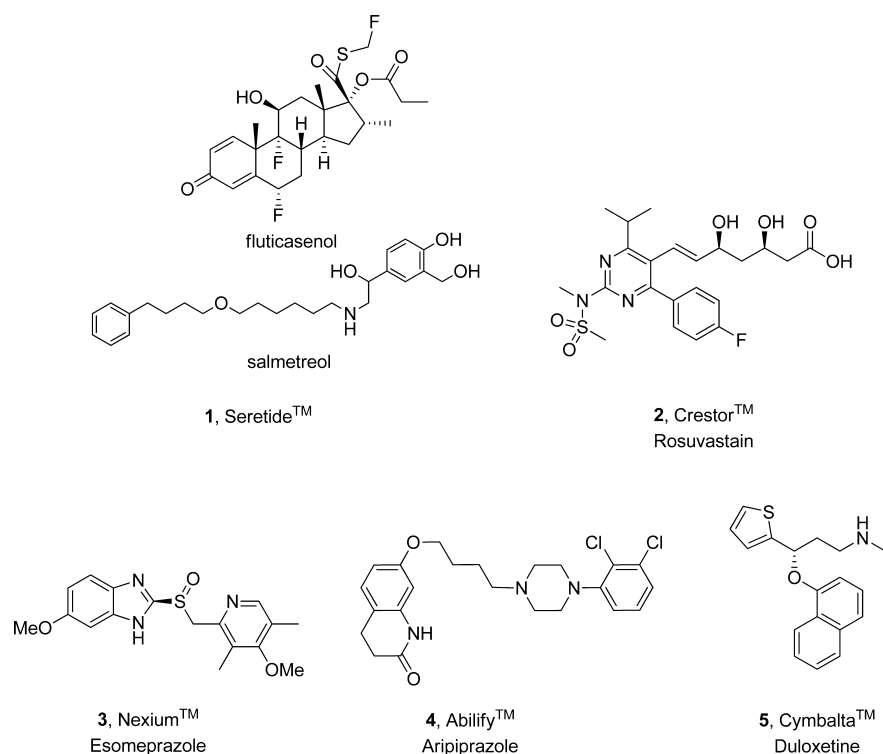


Figure 1. Structures of the top selling small molecule drugs of 2013 globally.

Table 3. Top 10 Global Pharmaceutical Corporations in 2013 in Terms of Sales¹

rank	company	sales (US\$Bn)	2013 growth (%)
1	Novartis	50.5	+1.9
2	Pfizer	44.3	-2.6
3	Sanofi-Aventis	38.1	+1.4
4	Merck & Co.	36.3	-7.0
5	Roche	36.1	+5.3
6	GlaxoSmithKline	32.5	+1.5
7	Johnson & Johnson	30.7	+12.2
8	AstraZeneca	30.2	-2.9
9	Teva	24.2	-1.8
10	Eli Lilly	23.0	+8.4

coupled with the exodus from CNS drug discovery, it will be interesting to see the impact in next year's data.

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AUTHOR INFORMATION

Notes

Views expressed in this editorial are those of the author and not necessarily the views of the ACS.

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