

Top 4 drug categories by spend: autoimmune, oncology, diabetes, obesity

Large treatable populations and costly medicines combine for big spending

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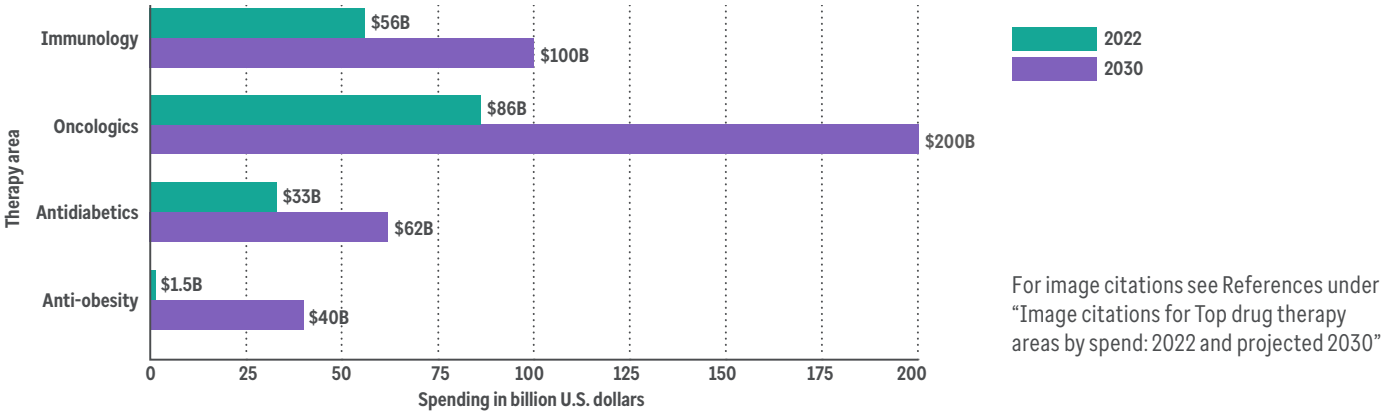
Optum Rx®

The modern pharmaceutical market changes fast, with new drugs seeming to arrive daily. And since new drugs tend to cost more than old drugs, overall spending continues to rise.[1]

While the drugs may change, the top categories in drug spend seem to be very consistent. With many patients and expensive treatments, immunology, oncology, and diabetes are top drivers of overall drug spending. Not just today, but for many years.

Here's a look at current sales and projections out to 2030 for these conditions:

Top drug therapy areas by spend: 2022 and projected 2030



For image citations see References under "Image citations for Top drug therapy areas by spend: 2022 and projected 2030"

As you can see, in addition to the first three classes, there are new treatments for a very common condition: obesity. GLP-1 drugs provide significant weight loss but also are extremely expensive. They are poised to build an entirely new, jumbo segment within the top drug spending categories over the coming several years.

We're going to spend the next few minutes explaining what you can expect to happen in these costly treatment areas through the rest of the 2020's. More important, we'll talk about what you can do to protect your plan from wasteful or excessive spending.

Covid cliff

One category missing from this list is Covid-19 vaccines and treatments. Combined sales for these drugs reached approximately $100 billion in 2022 – far exceeding any other class.[2] However, this was only a temporary blip. Sales fell sharply in 2023 – by as much as 97% – as demand dipped.[3]

1 Immunology

Class profile

The top spending drug category is for medications treating autoimmune disorders. These occur when the body's immune system mistakenly attacks healthy tissue in the body.[4]

Common autoimmune conditions include lupus, inflammatory bowel disease, multiple sclerosis, and rheumatoid arthritis. There are more than 80 autoimmune disorders.[5] It's thought that some combination of genetics and environmental factors like chemicals, stress – even the Western style diet – may be causing the increase.[6]

The main spending drivers in this class are the number of people who suffer from one or more of these conditions, and the cost of treatment.



50 Million

Approximately 50 million people in the U.S. have one or more autoimmune conditions.[7]



$80,000

Humira® (adalimumab) has dominated the autoimmune market at an annual wholesale acquisition cost in excess of $80,000.[8]

Biosimilar costs

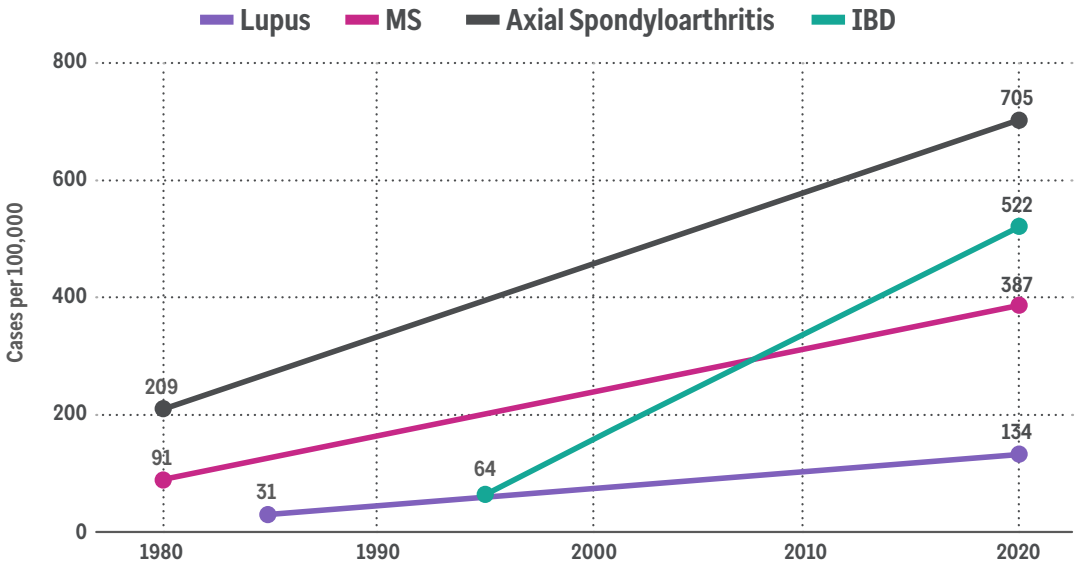
As many as 94% of rheumatoid arthritis patients could use biologic disease-modifying drugs in a given year.[9] The average cost per year for a patient using a biologic ranges from $25,000–$40,000 per year.[10]

Fortunately, a new wave of biologic competitor drugs, called biosimilars, have come to market. Biosimilars are approved according to the same standards of quality, safety and efficacy as approved biological medicines.

The benefit is that biosimilars can cost on average up to 50% less than the originals.[11] Biosimilars for Humira can cost 83% less.[12]

The number of new cases of autoimmune disorders is also rising — by nearly 20% each year.[13] This graph shows that the prevalence of multiple sclerosis (MS) has increased approximately 237% in the years between 1980 and 2021.

Prevalence per 100,000 of Lupus, MS, Axial Spondyloarthritis and IBD in the U.S.



Adapted from: DrBonnie360. Some incidence, prevalence & growth estimates for selected autoimmune diseases (AIIDs). Published November 4, 2022.

Optum Rx strategy

After evaluating the adalimumab category, Optum Rx will prefer the biosimilar Amjevita, including low and high list price options, to drive savings of up to 83% off the Humira list price. Optum Rx will exclude Humira from commercial formularies, which will accelerate the use of lower cost biosimilars and provide immediate savings to clients.

Beginning January 1, 2025, Optum Rx will prefer FDA-approved interchangeable adalimumab biosimilars on commercial formularies, bringing copays to $0 for patients while guaranteeing drug supply and availability of all dosage strengths. Plan sponsors will see up to 83% savings per prescription compared to Humira's list price.

Looking ahead, Optum Rx will continue to evaluate opportunities, optimize formularies, and further lower net cost for plan sponsors.

2 Oncology

Class profile

Cancer begins when genetic changes cause cells to grow uncontrollably. There are more than 100 different cancers.

Cancer treatments are grouped by function. Different drugs are used to slow, stop, or eliminate the cancer. Others are used as palliative and supportive care to manage symptoms and side effects.[14] We are addressing all these groups together.

Cancer costs continue to rise, and the causes will sound familiar: More people with a cancer diagnosis, and high-priced drugs.

While the risk of dying from cancer is lower than 30 years ago, more people are contracting cancer. For example, **the U.S. expects to see about two million new cancers diagnosed in 2024 — the highest ever.**[15]

Perhaps surprisingly, the number of younger patients being diagnosed with cancer is growing faster than for those over 50. Due to advances in cancer screening and detection, this number will increase significantly in the years to come.[16]

Despite the increase in diagnosed cases, the cancer death rate in the U.S. fell by 33% between 1991 and 2020, thanks to advances in prevention, early detection, and treatment.[17] Unfortunately, many new cancer drugs are quite expensive.

The median annual cost for new oncology medicines was $260,000 in 2022 — more than **300% higher** than 10 years before. **Over the past five years, 79% of newly launched oncology drugs were priced at more than $100,000 per year.**[18]

Some analysts believe that the recent Inflation Reduction Act could lower some prices in the future. For example, five of the first 10 drugs chosen by the Department of Health and Human Services for price negotiation are in the oncology class.[19]

The cost of cancer care will continue to be a barrier for some patients. However, newly approved oncology biosimilars are already making a difference. Since they began to enter the field in 2019, biosimilars cut the growth rate in oncology spending **by nearly half** by 2022. This trend should continue through 2026.[20]

Optum Rx strategies

All cancer patients who fill their prescriptions at Optum Specialty Pharmacy get the benefit of our end-to-end patient management model. This includes our Oncology Center of Excellence, Optum® Connections, and our new Optum Savings IQ technology. We use disease specific clinical assessments and interventions to help patients stay adherent, avoid costly complications, and even automated ways to find financial resources to help pay for their medications.

Our clients can also choose from a full suite of utilization management strategies, including prior authorization, step therapy, or quantity limits to help members make the best use of their pharmacy benefits. These programs have helped clients achieve gross savings of 13% on average drug costs.[21]

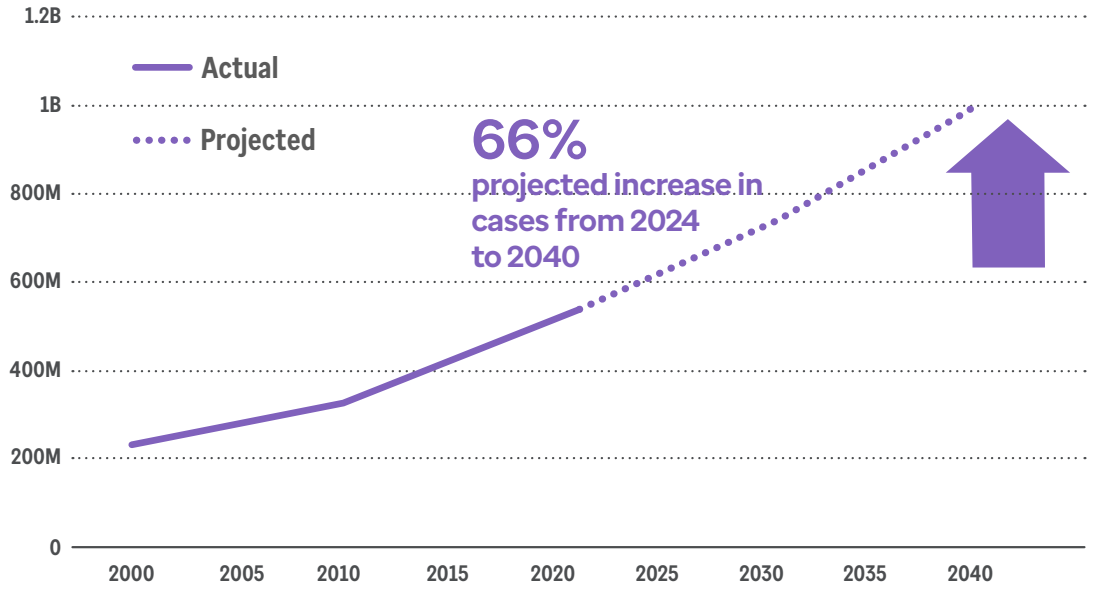
3 Diabetes

Class profile

Diabetes is a chronic condition leading to problems such as heart disease, vision loss, and kidney disease. About 38 million U.S. adults have diabetes, and it is the eighth leading cause of death.[22]

Diabetes costs employers an estimated $245 billion per year, including about $175 billion in direct costs, such as medication and treatment.[23]

Global diabetes cases rising



Adapted from: The Conversation. Global diabetes cases on pace to soar to 1.3 billion people in the next 3 decades, new study finds. Published July 30, 2023.

What is driving spend?

The absolute number of people with diabetes keeps growing, and the sheer size of the group generates significant spending.[24] In fact, by the year 2050, we expect 1.3 billion cases of diabetes, largely driven by an aging population and increased obesity.[25]

Someone with obesity is approximately **10 times** more likely to develop type 2 diabetes and related conditions such as heart disease and stroke. These are among the leading causes of preventable, premature death.[26] Up to 95% of diabetics have type 2, considered a preventable lifestyle condition.[27]

Treating diabetes usually requires ongoing medication (in addition to diet and exercise).[28] A 2023 report found that diabetes medications represent 44% of the total direct medical cost of treating diabetes.[29]

Optum Rx strategies

The Optum Rx Diabetes Management program uses machine learning to engage members through consults with pharmacists who are certified in diabetes management. They conduct medication reviews and coaching on medication adherence, diet, nutrition, and lifestyle modifications. Members may be eligible to receive a cloud-based glucose meter or continuous glucose monitor.

Participating clients enrolled in the full program for a minimum of 12 months saw savings of $1.40 per member per month – more than $1,000 per counseled member.[30] (See how one client realized an 8:1 return on investment by implementing the OptumRx Diabetes Management program.)

4 Obesity

Class profile

Overweight or obesity is defined as a body weight in excess of what is considered healthy for a given height.[31] Approximately 42% of U.S. adults are considered obese.[32]

Costs for obesity treatments are expected to rise as utilization grows for GLP-1 agonists arrive. **Sales for this class are projected to reach $40 billion by 2030.**

Obesity is not just overeating. Researchers are beginning to believe that most obesity may result from interactions among multiple genes and environmental factors.[33]

One explanation is the **energy-thrifty genes** theory. This hypothesis holds that the same genes that helped our ancestors survive occasional famines by hording energy are now harmful when food is plentiful all the time.[34]

GLP-1 drugs aim at such deep-rooted causes by affecting several organ systems – including acting directly on the central nervous system. The result is to reduce appetite and food intake, leading to long-term weight loss.[35]

Clinical studies show reductions in body weight between 15% - 21% for Wegovy and Zepbound:

Body weight change from baseline by week

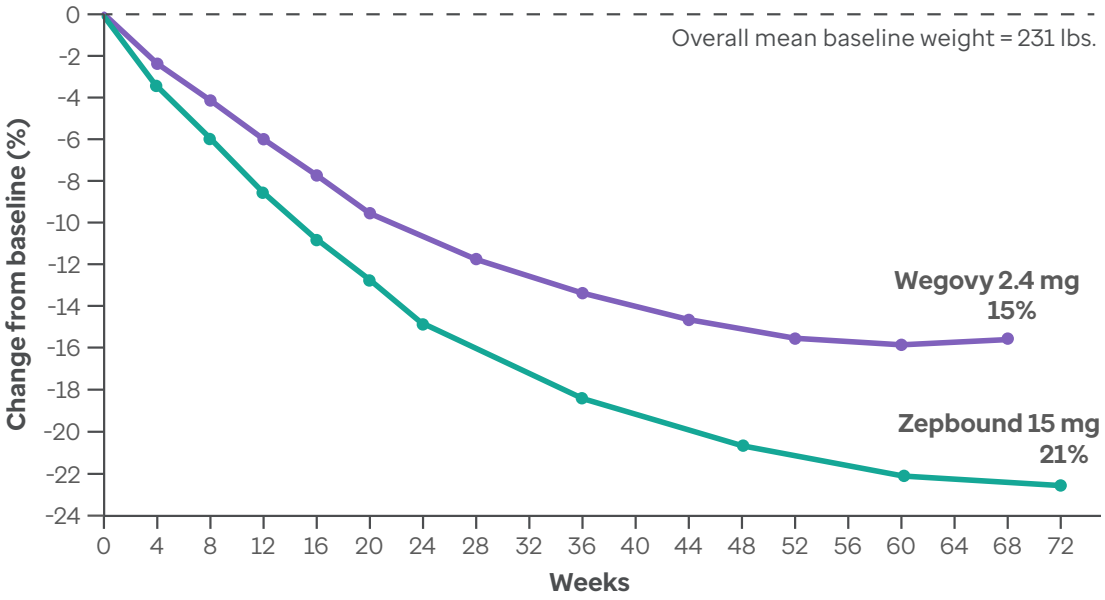


Image adapted from: (Wegovy) New England Journal of Medicine. Once-Weekly Semaglutide in Adults with Overweight or Obesity. Published March 18, 2021. (Zepbound) New England Journal of Medicine. Tirzepatide Once Weekly for the Treatment of Obesity. Published July 21, 2022.

Optum Rx strategies

Based on FDA package labeling, more than half of U.S. adults are eligible for a GLP-1. And while GLP-1 drugs are used for both diabetes and obesity, **in 2023, spending on obesity GLP-1s grew 4 times faster than spending on diabetes GLP-1s.**[36]

Therefore, Optum Rx has developed an innovative new weight management solution suite called Optum Rx Weight Engage. These programs leverage virtual care to provide healthy diet and activity planning, plus other health coaching.

Optum Rx Weight Engage formulary and benefit strategies deliver financial sustainability, while also ensuring highly motivated participants have a durable weight loss outcome. Look here for more about Weight Engage.

To find out more about how we are helping clients manage the biggest drug spend categories, please contact us.



Additional resources

- Transforming the Pharmacy Industry with Transparency
- How to Manage Blockbuster Anti-Obesity Drugs
- Slash Medication Costs in 3 Steps
- The secret to lowering the total cost of care

Podcast

- Transforming the Pharmacy Industry with Transparency

Webinars

- Rethinking Weight Management and Wellness

About Optum Rx

Optum Rx is a pharmacy care services company helping clients and more than 60 million members achieve better health outcomes and lower overall costs through innovative prescription drug benefits services.

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a-c = North American market. 4 = U.S. figures.

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