Psoriasis Market Forecast

Description: Enbrel (etanercept; Amgen/Pfizer) remains the market leader, with 32% of an estimated $4.5bn psoriasis market in 2011. However, Humira (adalimumab; Abbott/Eisai) is closing in, with 29% market share. Still, Stelara (ustekinumab; Janssen Biotech) is trailblazing the US and EU markets, threatening both brands. By 2020, biosimilars, generics and four product launches will grow the market to $5.5bn.

Features and benefits

- Access Datamonitor’s patient-based psoriasis market forecast of over 50 products in the seven major markets, with clear methodology and assumptions.
- Assess current and future patient numbers and enhance understanding of the impact future events may have on these.
- Evaluate which novel products Datamonitor expects to launch over the coming decade, and how each of these will alter the market.
- Gain insight into the psoriasis competitive landscape, and determine which brands drive growth.

Highlights

Owing to delayed competition from key contender Ozespa (briakinumab; Abbott), a favorable dosing regimen, and expansion into Japan in March 2011, Stelara will continue its ascendance in the seven major markets (the US, Japan, France, Germany, Italy, Spain, and the UK), reaching peak sales of $1,516m by 2016. AIN457 (secukinumab; Novartis) could be the first-to-market interleukin (IL)-17 drug for psoriasis. Akin to IL brand Stelara’s superb performance to date, Datamonitor forecasts high uptake for AIN457, with sales of $252m by 2020, following launch in 2014. Making AIN457 a key growth driver of the systemic antipsoriasis class over the next decade.

Ozespa’s future in psoriasis remains unclear, after its US and EU regulatory filings were withdrawn in January 2011, owing to safety issues. Datamonitor projects commercial success hinged on Abbott resubmitting US and EU regulatory applications. With estimated launch by 2013, its sales are forecast to reach $308m by 2020.

Your key questions answered

- How will the overall psoriasis market dynamics evolve in terms of patients and sales from 2011 through to 2020?
- Which drug classes will experience the most change through to 2020, and which brands are fuelling these changes?
- What impact will the launch of novel biologic AIN457 (secukinumab; Novartis) have on market dynamics across the seven major markets?
- To what extent can oral candidates Tofacitinib (CP-690,550; Pfizer) and Apremilast (CC-10004; Celgene) challenge established oral and biologic drugs?
- What is the future outlook for Abbott’s Ozespa (briakinumab), following the withdrawal of its regulatory filings in early 2011?
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