Product Profiles: Disease Modification in Rheumatoid Arthritis - Game-changing therapy close to market

Description: The potential for Pfizer's tofacitinib (CP-690,550) to drive a paradigm change in rheumatoid arthritis treatment edges closer, with news in 2011 that US, EU, and Japanese regulatory agencies are reviewing its applications. 2011 also saw lifecycle management strategies in effect with the launch of a reformulation of Orencia and a strong marketing move to revise the US drug label of Actemra.

Scope:

- Access Datamonitor's independent appraisal of prominent brands and pipeline agents for rheumatoid arthritis.
- Enhance understanding of how marketed and pipeline drugs compare to one another in terms of clinical and commercial attributes.
- Review important clinical developments of novel late-stage pipeline candidates, with analysis of new clinical trial data.
- Gain insight into physician perception and product positioning in the treatment algorithm of key brands.

Highlights:

- With a novel mode of action, efficacy in line with biologics, and positive data from an active comparator trial versus first-line contender Humira (adalimumab; Abbot/Eisai), tofacitinib displays immense clinical and commercial prospects. Still, its positioning and eventual pricing relative to biologics are unclear and will dictate physician uptake.
- Bristol-Myers Squibb executed a key lifecycle management strategy of intravenous brand Orencia with the US launch of a subcutaneous (SC) form in 2011. Enhancing its treatment offering relative to Roche's Rituxan (rituximab; Biogen Idec) and Actemra (tocilizumab). Still, SC Actemra is in Phase III and new drugs on the horizon pose a future threat.
- Roche's attempt to change market dynamics with Actemra continues. With two ongoing head-to-head trials versus Humira, it has also filed with the FDA to revise Actemra's label. If granted, it could mean an unprecedented shift in RA treatment, as Actemra, a non-TNF biologic, could be selected ahead of dominant TNF inhibitors Enbrel and Humira.

Reasons to buy:

- What are the comparative strengths, weaknesses, opportunities, and threats of the key rheumatoid arthritis products and pipeline candidates?
- To what extent do future therapies satisfy the main clinical unmet needs in rheumatoid arthritis treatment?
- How do rheumatologists perceive key marketed and pipeline agents relative to clinical and commercial attributes?
- What strategies are rheumatoid arthritis market players carrying out in the face of intensifying competition?
SWOT analysis
Product positioning
Use by line of therapy
Physician perception of Enbrel
Clinical and commercial attractiveness
Humira (adalimumab; Abbott/Eisai)
Drug profile
Development overview
SWOT analysis
Product positioning
Clinical and commercial attractiveness
Remicade (infliximab; Janssen Biotech/Johnson & Johnson/Merck & Co./Mitsubishi Tanabe)
Drug profile
Development overview
SWOT analysis
Product positioning
Clinical and commercial attractiveness
Simponi (golimumab; Janssen Biotech/Johnson & Johnson/Merck & Co./Mitsubishi Tanabe)
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Physician perception of Simponi
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Cimzia (certolizumab; UCB)
Drug profile
Development overview
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Product positioning
Physician perception of Cimzia
Clinical and commercial attractiveness
Actemra/RoActemra (tocilizumab; Chugai/Roche)
Drug profile
Development overview
SWOT analysis
Product positioning
Up to 64% of all patients receiving intravenous Actemra would be switched to subcutaneous formulation
Physician perception of Actemra
Clinical and commercial attractiveness
Orencia (abatacept; Bristol-Myers Squibb)
Drug profile
Development overview
SWOT analysis
Product positioning
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Rituxan/MabThera (rituximab; Genentech/Biogen Idec/Roche/Chugai)
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Drug profile
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Physician perception of tofacitinib
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FosD (fostamatinib disodium, R788; AstraZeneca/Rigel Pharmaceuticals)
Drug profile
Satisfaction of unmet needs
Physician perception of tofacitinib
Clinical and commercial attractiveness
Development overview
SWOT analysis
Satisfaction of unmet needs
Clinical and commercial attractiveness
Other drugs in development for rheumatoid arthritis
AIN457 (secukinumab; Novartis)

Development overview
SWOT analysis
Satisfaction of unmet needs

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