Rheumatoid arthritis is a progressive disease of the joint structure that may be localized or systemic. It varies significantly in severity, producing symptoms that range from minor aches to severe disability and joint deformity. While rheumatoid arthritis can be diagnosed at any age, for childhood to the later years, it most commonly presents with significant symptoms at about middle age. From that point, the disease can progress quickly, slowly or virtually not at all. With an aging population, the unmet need for therapeutics in this area is expected to increase simultaneously.

This report discusses the world market for rheumatoid arthritis therapeutics in terms of its potential in the growing older (aged 45-plus years) population in the United States as opposed to a rehash of experienced and projected revenues. There are several reason for this:

A large number of therapeutic applications for rheumatoid arthritis are currently in development and are based on advanced technology in drug design and development.

Because much of the potential use of new therapeutics is not associated with commonly available databases, it is often impossible to determine their level and type (monotherapy or part of polytherapy) of their application in the growing market environments.

The status of the current market in terms of revenues is misleading of the potential market as a whole. It does not allow for the understanding of the potential of unmet need, which will be discussed in the various sections of this report, and is in no way reflected by the current revenue picture for rheumatoid arthritis. The difference can be as stark as the difference between the surface of the sun and the dark side of the moon.

The current United States total available market (TAM) potential for rheumatoid arthritis therapeutics is approximately $48.5 billion. However, only some $16.6 billion (34.2% of the TAM) is considered to be the serviceable available market (SAM).

Modern medical science is moving rapidly to determine the pathological mechanisms involved in the development and progression of rheumatoid arthritis. Principally these center on the action of the immune system. As our understanding of these mechanisms increase, so does our ability to design newer and more effective therapies.

This volume of the Markets in Geriatric Medicine Series looks at the new evidence concerning the mechanisms involved in the pathology and the specific molecules that the body uses to regulate the process. It also explores current treatment modalities for rheumatoid arthritis, including non-steroidal anti-inflammatory drugs (NSAIDs), disease modifying anti-rheumatic drugs (DMARDs) and corticosteroids. It also looks at the new and emerging research and development efforts into the discovery of advanced therapeutic products that focus on immune system targets such as tumor necrosis factor-α (TNF-α), interleukins-1 (IL-1), interleukins-6 (IL-6), interleukin-15 (IL-15) and p38-MAP-kinase. The report discusses the latest in progress towards clinical development of immunoregulatory molecules that may be introduced over the next decade for the treatment of rheumatoid arthritis at its most basic levels.
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