Global Immunology Market to 2022 - Large pipeline and competitive market to drive long-term market growth

Description:
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Summary
Immune-mediated inflammatory diseases are a very common set of chronic disorders that affect 5–7% of western populations. Although they are often disparate in terms of their symptoms and key patient demographics, they are pathophysiologically linked, being characterized by dysregulation of immune pathways and an inappropriate immune response. Generally, disease-modifying anti-rheumatic drugs, a highly genericized class of systemic small-molecule-based agents, are used in the first-line treatment of these diseases. These are supplemented in many cases by shorter-term glucocorticoid therapy, another class of highly genericized systemic agents.

However, as these therapies often fail to elicit an adequate long-term response, a large second-line therapy segment has emerged in these markets, beginning with the approval of Remicade (infliximab) and Enbrel (etanercept) in 1998. This segment consists largely of premium systemic monoclonal Antibodies (mAbs), which are highly commercially successful due to their widespread usage and high cost. Although the patents for many of these mAbs either have already expired or are due to expire during the forecast period, the market is expected to experience continued growth.

Scope
Although the patents for many of these mAbs either have already expired or are due to expire during the forecast period, the market is expected to experience continued growth, from $61.5 billion in 2015 to $74.2 billion in 2022, at a compound annual growth rate of 2.71%.

- What factors are driving the market growth?
- How can the factors limiting growth be overcome?

There is a very large pharmaceutical pipeline for immunology, consisting of 1,838 products in active development. However, the commercial performance of the products in the late-stage pipeline is expected to be moderate.

- What gaps in the market are being addressed by the most promising of these late-stage pipeline products?
- How does the composition of the pipeline compare with that of the existing market?

Several key commercially successful products, including Humira (adalimumab) and Remicade, are due to lose patent protection in the forecast period.

- How will this affect their revenues in this period?
- How are their manufacturers, AbbVie and Johnson & Johnson, responding to this?

The key players in the market, all of which are among the top 20 pharmaceutical companies, are expected to maintain their market lead throughout the forecast period.

- What is driving this continued market dominance?
- Who will the new market players be?

Reasons to buy
This report will allow you to:

- Understand the current clinical and commercial landscape by considering disease pathogenesis, diagnosis, prognosis and the treatment options available at each stage of diagnosis
- Visualize the composition of the immunology market across each indication, in terms of dominant molecule types and targets, highlighting the key commercial assets and players
- Analyze the immunology pipeline and stratify by stage of development, molecule type and molecular target, with a granular breakdown across key indications
- Understand the growth in patient epidemiology and market revenues for the immunology market globally and across the key players and product types
- Stratify the market in terms of the split between generic and premium products and assess the role of
these product types in the treatment of the various immunological disorders
- Identify commercial opportunities in the immunology deals landscape by analyzing trends in licensing and co-development deals

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