

# MARKET REPORT



## PharmaPoint: Atopic Dermatitis - Global Drug Forecast and Market Analysis to 2024

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# PharmaPoint: Atopic Dermatitis - Global Drug Forecast and Market Analysis to 2024

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# PharmaPoint: Atopic Dermatitis - Global Drug Forecast and Market Analysis to 2024

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## Summary

Although the past decade has seen the atopic dermatitis market remain relatively unchanged and a saturated, highly genericized arena, the coming decade could see the launch of the first biologic, which will set a precedent and pave the way for others to follow suit.

By the mid-to-late term of GlobalData's 2014 to 2024 forecast, Sanofi/Regeneron's dupilumab is expected to reshape the adult moderate and severe treatment landscape and to slowly enter the market for younger patients with milder forms of the disease.

Other events that are expected to invoke change to the previously stagnant atopic dermatitis market include the launch of a non-steroidal topical from Anacor, AN2728, generic erosion of branded topicals Protopic and Elidel in the US.

Exciting times lay ahead for the atopic dermatitis marketplace, as the above events are due to occur against the backdrop of increasing research into the multiple etiologies that give rise to the disease. With existing unmet need for a better treatment armamentarium for severe, recalcitrant patients and an estimated drug-treated population that hovers around the 110 million mark over the next decade, atopic dermatitis represents an attractive dermatology sector for drug developers, and this should fuel commercial interest into this marketplace.

## Highlights

### Key Questions Answered

- How will the atopic dermatitis market (sales and patient numbers) evolve over the 10-year forecast period from 2014 to 2024?
- Which brands and specific drug classes did physicians select for their atopic dermatitis patients in 2014 and how do they foresee their prescribing behavior evolving over the next five years?
- How will the launch of late-stage pipeline therapies such as dupilumab and AN2728 shape the future treatment landscape?
- What are the remaining unmet needs and opportunities for drug developers within the atopic dermatitis market?

### Key Benefits

- The main drivers of growth in the atopic dermatitis over the 2014-2024 forecast period include the launch of the first biologic; Sanofi/Regeneron's dupilumab, and continued uptake of calcineurin inhibitors of systemic

therapies.

- Owing to high genericization, no distinct trends in corporate strategy exist within the atopic dermatitis market. However, over the coming decade, the introduction of biologics, in particular interleukin (IL) inhibitors, will emerge as a key future strategy for this marketplace.
- High unmet need exists for a better treatment armamentarium for severe, recalcitrant patients. This patient segment remains underserved as physicians have few to no pharmacological options following treatment failure with or intolerance to cyclosporine, and as a result physicians often resort to prescribing off-label therapies.
- Although dupilumab is forecast to gain a foothold in the severe population by late-forecast, it will not completely eradicate the high unmet need within the refractory group in the severe patient segment. There will still be a gap for other novel systemics, as dermatologists stress a desire for more than one treatment option to be added to their armamentarium.

## Scope

- Overview of atopic dermatitis, including epidemiology, etiology, pathophysiology, symptoms, diagnosis, and current treatment options.
- Annualized atopic dermatitis therapeutics market revenue, annual cost of therapy and treatment usage pattern data from 2014 to 2024.
- Key topics covered include strategic competitor assessment, market characterization, unmet needs, and implications for the atopic dermatitis therapeutics markets.
- Pipeline analysis: comprehensive data split across different phases, emerging novel trends under development, and detailed analysis of mid-to-late stage pipeline drugs.
- Analysis of the current and future market competition in the global atopic dermatitis therapeutics markets. Insightful review of the key industry drivers, restraints and challenges. Each trend is independently researched to provide qualitative analysis of its implications.

## Reasons to buy

The report will enable you to -

- Develop and design in-licensing and out-licensing strategies through a review of pipeline products and technologies, and by identifying the companies with the most robust pipeline. Additionally a list of acquisition targets included in the pipeline product company list.
- Develop business strategies by understanding the trends shaping and driving the global atopic dermatitis therapeutics markets.
- Drive revenues by understanding the key trends, innovative products and technologies, market segments, and companies likely to impact the global atopic dermatitis therapeutics markets in the future.
- Formulate effective sales and marketing strategies by understanding the competitive landscape and by analyzing the performance of various competitors.
- Identify emerging players with potentially strong product portfolios and create effective counter-strategies to gain a competitive advantage.
- Track drug sales in the global atopic dermatitis therapeutics markets from 2014-2024.
- Organize sales and marketing efforts by identifying the market categories and segments that present

maximum opportunities for consolidations, investments and strategic partnerships.

## Additional Details

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# Table Of Contents for PharmaPoint: Atopic Dermatitis - Global Drug Forecast and Market Analysis to 2024

- 1 Table of Contents1 Table of Contents 101.1 List of Tables 141.2 List of Figures 182 Introduction 192.1 Catalyst 192.2 Related Reports 192.3 Upcoming Related Reports 203 Disease Overview 213.1 Etiology and Pathophysiology 213.1.1 Etiology 213.1.2 Pathophysiology 223.2 Symptoms 264 Epidemiology 284.1 Disease Background 284.2 Risk Factors and Comorbidities 284.3 Global Trends 294.3.1 US 304.3.2 France 304.3.3 Germany 314.3.4 Italy 314.3.5 Spain 314.3.6 UK 324.3.7 Japan 324.3.8 China 324.3.9 India 334.4 Forecast Methodology 334.4.1 Sources Used 364.4.2 Sources Not Used 414.4.3 Forecast Assumptions and Methods 414.5 Epidemiological Forecast for Atopic Dermatitis (2014-2024) 424.5.1 One-Year Total Prevalent Cases of Atopic Dermatitis 424.5.2 Age-Specific One-Year Total Prevalent Cases of Atopic Dermatitis 444.5.3 Sex-Specific One-Year Total Prevalent Cases of Atopic Dermatitis 454.5.4 Age-Standardized One-Year Total Prevalence of Atopic Dermatitis 474.5.5 One-Year Total Prevalent Cases of Atopic Dermatitis by Severity 484.6 Discussion 504.6.1 Epidemiological Forecast Insight 504.6.2 Limitations of the Analysis 504.6.3 Strengths of the Analysis 515 Disease Management 525.1 Diagnosis and Treatment Overview 525.1.1 Diagnosis 525.1.2 Treatment Guidelines 545.1.3 Leading Prescribed Drugs for the Treatment of RA 565.1.4 Clinical Practice 585.2 US 595.3 5EU 645.4 Japan 716 Competitive Assessment 746.1 Overview 746.2 Strategic Competitor Assessment 756.3 Product Profiles - Major Brands 766.3.1 Protopic (tacrolimus) 766.3.2 Elidel 846.3.3 Cyclosporine (numerous generic names) 896.3.4 Other Therapeutic Drug Classes Used in Atopic Dermatitis 946.4 Product Profiles - Off-Label Therapies 966.4.1 Xolair (omalizumab) 966.4.2 Actimmune (interferon gamma-1b) 1017 Opportunity and Unmet Need 1067.1 Overview 1067.1.1 A Systemic Drug for Severe Recalcitrant Patients 1077.1.2 Tests that Stratify Patients and Allow for a Tailored Treatment Approach 1107.1.3 A Drug that Effectively Controls Patients' Pruritus 1147.1.4 Further Research into the Pathophysiology of Atopic Dermatitis 1167.1.5 A Drug that Induces Disease Remission 1197.1.6 Improved Quality of Life for Both Patients and their Carers 1208 Pipeline Assessment 1238.1 Overview 1238.2 Clinical Trial Mapping 1248.2.1 Clinical Trials by Therapy Type 1248.3 Promising Drugs in Clinical Development 1258.3.1 Dupilumab (SAR231893/ REGN668) 1288.3.2 AN2728 1428.3.3 Other Drugs in Development 1549 Current and Future Players 1569.1 Overview 1569.2 Trends in Corporate Strategy 1589.3 Company Profiles 1599.3.1 Astellas 1599.3.2 Meda 1629.3.3 Sanofi/Regeneron/Boehringer Ingelheim 1649.3.4 Anacor 16610 Market Outlook 16910.1 Global Markets 16910.1.1 Forecast 16910.1.2 Global Drivers and Barriers 17310.2 US 17810.2.1 Forecast 17810.2.2 Key Events 18210.2.3 Drivers and Barriers 18210.3 5EU 18410.3.1 Forecast 18410.3.2 Key Events 18910.3.3 Drivers and Barriers 18910.4 Japan 19410.4.1 Forecast 19410.4.2 Key Events 19710.4.3 Drivers and Barriers 19711 Appendix 20011.1 Bibliography 20011.2 Abbreviations 21311.3 Methodology 21511.4 Forecasting Methodology 21511.4.1 Diagnosed Atopic Dermatitis Patients 21511.4.2 Percent Drug-treated Patients 21611.4.3 Drugs Included in Each Therapeutic Class 21611.4.4 Launch and Patent Expiry Dates 21611.4.5 General Pricing Assumptions 21711.4.6 Individual Drug Assumptions 21811.4.7 Generic Erosion 22011.4.8 Pricing of Pipeline Agents 22011.5 Physicians and Specialists Included in this Study 22111.6 Primary Research - Prescriber Survey 22311.7 About the Authors 22411.7.1 Author 22411.7.2 Reviewer 22411.7.3 Epidemiologist 22511.7.4 Global Director of Therapy Analysis and Epidemiology 22511.7.5 Global Head of Healthcare 22611.8 About GlobalData 22711.9 Disclaimer 227

# List Of Tables in PharmaPoint: Atopic Dermatitis - Global Drug Forecast and Market Analysis to 2024

## 1.1 List of Tables

Table 1: Symptoms of Atopic Dermatitis 27

Table 2: Risk Factors and Comorbidities of Atopic Dermatitis 29

Table 3: Diagnostic Criteria for Atopic Dermatitis 34

Table 4: The Hanifin and Rajka Diagnostic Criteria for Atopic Dermatitis 34

Table 5: 9MM, Sources of Epidemiological Data used for the Forecast for the One-Year Total Prevalent Cases of Atopic Dermatitis 35

Table 6: 9MM, Sources of Epidemiological Data Used for the Segmentation of One-Year Total Prevalent Cases of Atopic Dermatitis by Severity 36

Table 7: 9MM, One-Year Total Prevalent Cases of Atopic Dermatitis, All Ages, Both Sexes, N, 2014-2024 43

Table 8: 9MM, One-Year Total Prevalent Cases of Atopic Dermatitis, by Age Group, Both Sexes, N, (Row %), 2014 44

Table 9: 9MM, One-Year Total Prevalent Cases of Atopic Dermatitis, by Sex, All Ages, N (Row %), 2014 46

Table 10: 9MM, One-Year Total Prevalent Cases of Atopic Dermatitis by Severity, All Ages, Both Sexes, N (Row %), 2014 49

Table 11: Treatment Guidelines for Atopic Dermatitis 56

Table 12: Most Prescribed Drugs for Atopic Dermatitis by Severity in the Global Markets, 2014 58

Table 13: Country Profile - US 63

Table 14: Country Profile - 5EU 70

Table 15: Country Profile - Japan 73

Table 16: Leading Treatments for Atopic Dermatitis, 2014 76

Table 17: Product Profile - Protopic 78

Table 18: Clinical Response Data of Protopic (0.03% and 0.1%) versus Vehicle Ointment at Week 12 from One Study in Pediatric Patients and Two Combined Studies in Adult Patients 79

Table 19: Protopic SWOT Analysis, 2015 82

Table 20: Global Sales Forecasts (\$m) for Protopic, 2014-2024 84

Table 21: Product Profile - Elidel 85

Table 22: Combined Clinical Efficacy Results of Elidel versus Vehicle Cream at Week 6 from Two Phase III Studies 86

Table 23: Elidel SWOT Analysis, 2015 88

Table 24: Global Sales Forecasts (\$m) for Elidel, 2014-2024 89

Table 25: Product Profile - Cyclosporine	91
Table 26: Cyclosporine SWOT Analysis, 2015	93
Table 27: Global Sales Forecasts (\$m) for Cyclosporine, 2014-2024	94
Table 28: Summary of Other Therapeutic Classes for Atopic Dermatitis, 2015	95
Table 29: Product Profile - Xolair	97
Table 30: Xolair SWOT Analysis, 2015	99
Table 31: Global Sales Forecasts (\$m) Xolair, 2014-2024	100
Table 32: Product Profile - Actimmune	102
Table 33: Actimmune SWOT Analysis, 2015	104
Table 34: Global Sales Forecasts (\$m) Actimmune, 2014-2024	105
Table 35: Overall Unmet Needs in Atopic Dermatitis - Current Level of Attainment	107
Table 36: Clinical Unmet Needs in Atopic Dermatitis - Gap Analysis, 2015	110
Table 37: Late-Stage Atopic Dermatitis Pipeline, 2015	127
Table 38: Product Profile - Dupilumab	131
Table 39: Ongoing Clinical Trials of Dupilumab in Atopic Dermatitis Patients, as of December 2014	134
Table 40: Dupilumab SWOT Analysis, 2015	140
Table 41: Global Sales Forecasts (\$m) for Dupilumab, 2014-2024	141
Table 42: Product Profile - AN2728	144
Table 43: Efficacy Results for AN2728 in Mild to Moderate Adolescent Atopic Dermatitis Patients (Day 29)	145
Table 44: AN2728 SWOT Analysis, 2015	151
Table 45: Global Sales Forecasts (\$m) for AN2728, 2014-2024	153
Table 46: Drugs in Early-stage Clinical Development for Atopic Dermatitis, 2015	154
Table 47: Key Companies in the Atopic Dermatitis Market, 2015	157
Table 48: Astellas Pharma's Atopic Dermatitis Portfolio Assessment, 2015	161
Table 49: Astellas Pharma SWOT Analysis, 2015	162
Table 50: Meda's Atopic Dermatitis Portfolio Assessment, 2015	163
Table 51: Meda SWOT Analysis, 2015	164
Table 52: Regeneron's Atopic Dermatitis Portfolio Assessment, 2015	166
Table 53: Regeneron SWOT Analysis, 2015	166
Table 54: Anacor's Atopic Dermatitis Portfolio Assessment, 2015	168
Table 55: Anacor's SWOT Analysis, 2015	168



Table 56: Global Sales Forecasts (\$m) for Atopic Dermatitis, 2014-2024	171
Table 57: Global Atopic Dermatitis Market - Drivers and Barriers, 2014-2024	173
Table 58: Sales Forecasts (\$m) for Atopic Dermatitis in the US, 2014-2024	180
Table 59: Key Events Impacting Sales for Atopic Dermatitis in the US, 2014-2024	182
Table 60: Drivers and barriers of the atopic dermatitis market in the US during the forecast period.	182
Table 61: Sales Forecasts (\$m) for Atopic Dermatitis in the 5EU, 2014-2024	187
Table 62: Key Event Impacting Sales for Atopic Dermatitis in 5EU, 2014-2024	189
Table 63: Atopic Dermatitis Market in 5EU - Drivers and Barriers, 2014-2024	189
Table 64: Sales Forecasts (\$m) for Atopic Dermatitis in Japan, 2012-2022	195
Table 65: Key Event Impacting Sales for Atopic Dermatitis in Japan, 2014-2024	197
Table 66: Atopic Dermatitis Market in Japan - Drivers and Barriers, 2014-2024	197
Table 67: Key Launch Dates	216
Table 68: Key Patent Expiries	216
Table 69: Physicians Surveyed, By Country	223

# List Of Figures, Charts and Diagrams in PharmaPoint: Atopic Dermatitis - Global Drug Forecast and Market Analysis to 2024

## 1.2 List of Figures

Figure 1: Immunologic Pathway Involved in Healthy, Acute Atopic Dermatitis, and Chronic Atopic Dermatitis Skin 24

Figure 2: 9MM, One-Year Total Prevalent Cases of Atopic Dermatitis, All Ages, Both Sexes, N, 2014-2024 43

Figure 3: 9MM, One-Year Total Prevalent Cases of Atopic Dermatitis, by Age Group, Both Sexes, N, 2014 45

Figure 4: 9MM, One-Year Total Prevalent Cases of Atopic Dermatitis, by Sex, All Ages, N, 2014 47

Figure 5: 9MM, Age-Standardized One-Year Total Prevalence (%) of Atopic Dermatitis, All Ages, Both Sexes, 2014 48

Figure 6: 9MM, One-Year Total Prevalent Cases of Atopic Dermatitis by Severity, All Ages, Both Sexes, N, 2014 49

Figure 7: Flow Chart of the Diagnosis and Management of Atopic Dermatitis 55

Figure 8: Atopic Dermatitis Therapeutics - Clinical Trials by Therapy Type and Development Stage, October 2015 125

Figure 9: Atopic Dermatitis - Phase III Pipeline, December 2014 126

Figure 10: Competitive Assessment of Late-Stage Pipeline Agents in Atopic Dermatitis, 2014-2024 127

Figure 11: Company Portfolio Gap Analysis in Atopic Dermatitis, 2014-2024 158

Figure 12: Global Sales for Atopic Dermatitis by Region, 2012-2022 172

Figure 13: Sales for Atopic Dermatitis in the US by Drug Class, 2014-2024 181

Figure 14: Sales for Atopic Dermatitis in 5EU by Drug Class, 2014-2024 188

Figure 15: Sales for Atopic Dermatitis in Japan by Drug Class, 2014-2024 196

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