

# MARKET REPORT



## OpportunityAnalyzer: Vasculitis - Opportunity Analysis and Forecast to 2024

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# OpportunityAnalyzer: Vasculitis - Opportunity Analysis and Forecast to 2024

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# OpportunityAnalyzer: Vasculitis - Opportunity Analysis and Forecast to 2024

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## Summary

Vasculitis is a family of rare autoimmune diseases, causing inflammation of the blood vessels, arteries, veins or capillaries. The different forms of vasculitis are classified by the size and location of the affected blood vessels. This report specifically covers large vessel vasculitis (LLV), Kawasaki disease (KD), antineutrophil cytoplasmic antibody (ANCA)-associated vasculitis (AAV), and Behçet's disease (BD). In 2014, there were 137,603 and 82,454 diagnosed prevalent and incident cases in the 7MM (US, France, Germany, Spain, Italy, UK, and Japan), respectively. Untreated, the organs and tissues affected by the damaged blood vessels do not get enough blood, which can lead to organ or tissue damage, or even death. J&J's Remicade was the first biologic in the vasculitis market, approved for BD in Japan in 2007. Other biologics approved for vasculitis include AbbVie's Humira for BD in Japan and Biogen/Roche's Rituxan for GPA/MPA in the 7MM. Several unmet needs still remain such as the development of drugs with improved safety and efficacy for use in both the induction and maintenance treatment settings. GlobalData expects the launch of six drugs during the 2014 to 2024 forecast period along with increased diagnosed patient numbers will drive the vasculitis market.

## Highlights

### Key Questions Answered

- How large an impact will biosimilars have on the vasculitis market? What do vasculitis specialists and key opinion leaders across the 7MM think about the evolving treatment landscape?
- What opportunities remain in the market for new product entrants?
- With six drug launches, five of which are biologics, which products are forecast to generate the highest sales over 2014-2024? How are product launches expected to affect the sales of induction and maintenance therapies?
- According to KOLs, what are the most important unmet needs in vasculitis? Will these needs be addressed by pipeline agents? What needs will remain by the end of the forecast period in 2024?
- What industry developments are likely to affect sales of the top-selling vasculitis drugs in the markets researched? Which is the largest growth market globally?

### Key Findings

- Biosimilars are expected to change the landscape for vasculitis and create pricing pressure in the vasculitis market. However, questions from physicians and regulators regarding the appropriate use of biosimilars still lingers.
- Sales of immunosuppressants are expected to decline due to the introduction of novel biologics and small molecules to treat vasculitis.
- Several unmet needs are expected to remain after the forecast period, as all pipeline drugs are in

development as induction therapies and maintenance therapies are lagging.

- With several major pharmaceutical companies involved in development of vasculitis products, the market will be dominated by Big Pharma who will leverage their R&D, manufacturing, and distribution networks.

## Scope

- Overview of vasculitis, including etiology, pathophysiology, and country-specific diagnosis and treatment recommendations.

- Annualized vasculitis market revenue, annual cost of therapy and treatment usage pattern data from 2014 and forecast for ten years to 2024.

- Key topics covered include strategic competitor assessment, market characterization, unmet needs, and implications for the vasculitis market.

- Pipeline analysis: comprehensive data split across different phases and emerging trends, specifically BMS's Orelvekin, GSK's Benlysta and Nucala, Genentech/Roche's Actemra, Celgene's Otezla, J&J's Remicade, and biosimilars (such as Celltrion/Hospira/Alvogen's Inflectra/Remsima).

- Analysis of the current and future market competition in the global vasculitis market. Insightful review of the key industry and governmental 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 your in-licensing and out-licensing strategies through a review of pipeline products and technologies, and by identifying the companies with the most robust pipeline.

- Develop business strategies by understanding the trends shaping and driving the vasculitis market.

- Drive revenues by understanding the key trends, innovative products and technologies, market segments, and companies likely to impact the global vasculitis market 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 vasculitis market from 2014-2024.

- Organize your 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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