

MARKET REPORT



PharmaPoint: Hepatitis B Virus (HBV) Therapeutics - Global Drug Forecast and Market Analysis to 2024

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PharmaPoint: Hepatitis B Virus (HBV) Therapeutics - Global Drug Forecast and Market Analysis to 2024

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Summary

Chronic hepatitis B virus (HBV) infection is a serious chronic liver disease caused by the failure of viral clearance following acute HBV infection. Despite the availability of effective prophylactic vaccines, the disease remains a serious global health concern, with estimated over 350 million people worldwide currently living with this condition. In addition, patients with chronic hepatitis B are at a high risk of developing life-threatening complications including liver cirrhosis and hepatocellular carcinoma (HCC). In 2010, an estimated 786,000 HBV-related deaths occurred worldwide.

Available treatment for chronic hepatitis B focuses on viral suppression, and include oral nucleos(t)ide analogues (NAs) and pegylated interferon (PEG-IFN). The two therapy classes have distinctive strengths and weaknesses. Nevertheless, most patients are using long-term NA treatment, and suffer from issues such as high accumulated treatment cost and low compliance.

For the purposes of this report, GlobalData defines the HBV infection therapeutics market to include sales of HBV-specific medication in patients 18 years and older in the eight major pharmaceutical markets (8MM; US, France, Germany, Italy, Spain, UK, Japan, and China). GlobalData expects the market to experience moderate growth that will be primarily driven by the uptake of therapies with novel mechanisms of action (MOAs).

Highlights

Key Questions Answered

- How good is the management of chronic HBV infection with marketed therapies?
- Which drugs and players are important in the current management landscape?
- Which pipeline agents will enter the market during the forecast period (2014-2024)?
- Will the leading pipeline agents fulfil the unmet needs of current management landscape?
- What clinical and commercial factors are likely to influence HBV therapeutic uptake in the US, 5EU, Japan and China?

Key Findings

- GlobalData projects the HBV therapeutics market in the 8MM to grow from approximately \$2.4 billion in 2014 to \$3.0 billion in 2024, at a compound annual growth rate (CAGR) of 2.4%. This growth across the 8MM will primarily be driven by the launch of pipeline agents, especially those with novel MOAs, while steep generic erosion across the 8MM is expected to curtail market growth over the forecast period.
- While pipeline agents have the potential to address some of the unmet needs in the HBV treatment landscape,

more clinical data are required to demonstrate their advantage over available therapies, according to interviewed KOLs. In addition, these agents are pioneers of novel therapies, which retain substantial room for future development.

- GlobalData anticipates that opportunities centered on the development of antivirals with novel MOAs, which can improve the efficacy of existing drugs, will exist for current and future players in the HBV therapeutic marketplace for the duration of the forecast period.

Scope

- Overview of chronic HBV infection, including epidemiology, etiology, pathophysiology, symptoms, diagnosis, and current treatment options.

- Topline HBV therapeutics market revenue from 2014-2024. Annual cost of therapy (ACOT) and major pipeline product sales in this forecast period are included.

- Key topics covered include strategic competitor assessment, unmet needs, pipeline assessment, and market outlook for the HBV therapeutics market.

- Pipeline analysis: comprehensive data split across different phases, emerging novel trends under development, synopses of innovative early-stage projects, and detailed analysis of late-stage pipeline products.

- Analysis of the current and future market competition in the global HBV therapeutics market. 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 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 global HBV therapeutics market.

- Drive revenues by understanding the key trends, innovative products and technologies, market segments, and companies likely to impact the HBV therapeutics 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.

- Organize your sales and marketing efforts by identifying the market categories and segments that present maximum opportunities for consolidations, investments and strategic partnerships.

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