

# MARKET REPORT



## Acne Vulgaris: Opportunity Analysis and Forecasts to 2026

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# Acne Vulgaris: Opportunity Analysis and Forecasts to 2026

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# Acne Vulgaris: Opportunity Analysis and Forecasts to 2026

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## Summary

Acne vulgaris (acne) is currently one of the most common and well-established dermatology conditions, affecting around 90% of the world's population at some point in their lifetime. The disease is a chronic, inflammatory dermatological condition of the pilosebaceous gland of the skin with a multifactorial pathogenesis. It is usually initiated during puberty by hormonal changes and further exacerbated by genetic factors.

Acne is a polygenic and multifactorial disease. According to current literature, the four major factors that interact with each other to produce acne lesions are -

- Elevated sebum secretion: Excess sebum, known colloquially as oil, is produced as a result of overactive sebaceous glands in the skin. Overactivation of these glands is correlated to increased hormone levels, particularly androgens.
- Abnormal keratinization: Hair follicles that would typically release oils become blocked.
- Bacterial colonization: Commensal bacteria *Propionibacterium acnes* (*P. acnes*) grow and thrive on accumulated oil within the hair follicles.
- Inflammation: A variety of cell types including those from both innate and acquired immunity are released into the skin.

In addition to these pathogenic causes, other risk factors that may contribute to acne include diet, genetics, stress and neuroendocrine dysregulation.

GlobalData projects the global acne vulgaris marketplace - which, for the purposes of this report, comprises seven major pharmaceutical markets (US, France, Germany, Italy, Spain, UK, and Japan) - to experience modest growth during the forecast period. The US contributes 90% of the 2016 7MM total sales, generating an estimated \$2.6 billion. With \$220 in sales from the 5EU, Germany was the largest market, with an estimated \$62M in sales in 2016.

By the end of the forecast period in 2026, acne sales are forecast to reach over \$4.3 billion, growing at a compound annual growth rate (CAGR) of 4.1% over the 10-year forecast period. The majority of sales will come from the US, which will maintain its 2016 lead and command 93% of the market in 2026. A substantial amount of growth in that market is attributed to the rapid uptake of Galderma's Epiduo (benzoyl peroxide and adapalene) for moderate patients and the continued success of isotretinoin. The anticipated launches of AOBiome's B244, Dermira's olumacostat glasaretil, and Novan's SB204 will add new molecular entities to the acne market for the first time in approximately 30 years. Paratek's and Allergan's Seysara, Foamix Pharmaceuticals' FMX-101, and Cassiopea's Winlevi are also expected to launch during the forecast period. Together, these late-stage pipeline products are expected to add approximately \$1.2B in sales to the acne market in 2026.

## Highlights

## Key Questions Answered

- For years, the acne vulgaris pharmaceutical market has remained relatively stagnant, as the only new therapeutics that have come to market were reformulations of already approved drugs. However, the current pipeline, both late-stage and early-stage, contain a wide variety of drugs with novel mechanisms of action. Will the late-stage drugs make a significant impact on the acne market? Which of these drugs will have the highest peak sales at the highest CAGR, and why?
- Key Opinion Leaders (KOLs) interviewed by GlobalData have indicated that there are considerably high unmet needs within the indication. What are the main unmet needs in this market? How can the pharmaceutical industry address these needs? Will the drugs under development fulfil the unmet needs of the acne market?
- How does the pediatric acne population differ from the adult acne population? Which population is less compliant to acne therapies?

## Scope

- Overview of acne vulgaris, including epidemiology, etiology, pathophysiology, symptoms, diagnosis, and treatment guidelines.
- Annualized acne therapeutics market revenue, annual cost of therapy and treatment usage pattern data from 2016 and forecast for ten years to 2026.
- Key topics covered include strategic competitor assessment, market characterization, unmet needs, clinical trial mapping and implications for the acne therapeutics market.
- Pipeline analysis: comprehensive data split across different phases, emerging novel trends under development, and detailed analysis of late-stage pipeline drugs.
- Analysis of the current and future market competition in the global acne 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. 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 acne therapeutics market.
- Drive revenues by understanding the key trends, innovative products and technologies, market segments, and companies likely to impact the global acne therapeutics market in future.
- Formulate effective sales and marketing strategies by understanding the competitive landscape and by analysing 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 acne therapeutics market from 2016-2026.
- 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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