



Global Dermatology Drugs Market to 2023 - Growth Driven by Increased Uptake of Interleukin Receptor Inhibitors for Psoriasis and Atopic Dermatitis

#1287797

\$4995

136 pages

In Stock

Report Description

Dermatology is a highly diverse therapy area that deals with diseases of the skin, hair and nails. Over 3,000 types of dermatological conditions are thought to exist, ranging from the autoimmune disorder psoriasis to the very common condition acne vulgaris. The scope of dermatological disorders is diverse in terms of severity and clinical presentation, and if a condition is not sufficiently kept under control, it can significantly impair the patient's quality of life.

The treatment landscape for dermatological disorders was traditionally dominated by genericized topical therapies such as glucocorticoids and retinoids. The approval of monoclonal antibodies (mAbs) such as Humira, Enbrel and Remicade for psoriasis revolutionized both the management of psoriasis and the dermatology therapy area. These first generation mAbs are now off-patent and have biosimilar versions approved by the FDA, but in recent years the therapy area has seen a number of new mAbs enter the market. These new approvals will provide patients with more treatment options and stimulate growth in the therapy area. In 2017 Dupixent became the first biologic to be approved for atopic dermatitis, expanding the use of biologics to an indication other than psoriasis.

Overall there are 871 products being actively developed in the dermatology pipeline, but these include products being developed for many smaller indications. The indications with the largest pipelines are psoriasis, atopic dermatitis and acne vulgaris, which contain 282, 136 and 70 products, respectively.

Scope

- Global revenue from the dermatology market is forecast to increase from \$19.8 billion in 2016 to \$36.6 billion in 2023, at a compound annual growth rate of 9.13%. Which drugs will achieve blockbuster status and how will the key player companies perform during the forecast period?
- What are the leading companies in terms of market share?
- Which companies are forecast to experience the largest growth in market share?
- Which companies rely heavily on revenue derived from antibacterial drugs?

- How will the market respond to recent approvals?
- Will generics and biosimilars have a significant impact on the market over the forecast period?
- What class of drugs dominate the market?
- What molecular targets are most popular in the pipeline?
- What are the commercial prospects for the most promising late-stage products?

Reasons to buy

- Understand the current treatment landscape, with portfolios of key marketed products and a focus on historical and forecast sales patterns, and an overview of each drug's mechanism of action.
- Analyze the dermatology pipeline through a comprehensive review of the pipeline segmented by stage of development, molecule type and molecular target.
- This review also provides a detailed look at dermatology product clinical trials to provide an insight into the risk associated with attempting to bring pipeline products to market.
- Predict growth in market size, with in-depth market forecasting from 2016 to 2023. The forecasts will provide an understanding of how epidemiology trends, new drug entries, and patent expirations will influence market value.
- Identify commercial opportunities in the dermatology deals landscape by analyzing trends in licensing and co-development deals."

Table Of Content

Notes:

1

1 4

1.1 List of Tables 6

1.2 List of Figures 7

2 Introduction 10

2.1 Therapy Area Introduction 10

2.2 Symptoms 10

2.3 Etiology and Pathophysiology 11

2.3.1 Atopic Dermatitis 11

2.3.2 Acne Vulgaris	13
2.3.3 Psoriasis	14
2.4 Co-morbidities and Complications	14
2.5 Diagnosis, Scales and Grading	15
2.5.1 Atopic Dermatitis	15
2.5.2 Acne Vulgaris	16
2.5.3 Psoriasis	17
2.6 Epidemiology Patterns and Forecasts - Prevalence and Patient Segmentation	17
2.6.1 Atopic Dermatitis	18
2.6.2 Acne Vulgaris	19
2.6.3 Psoriasis	20
2.7 Treatment	21
2.7.1 Topical Corticosteroids	22
2.7.2 Calcineurin Inhibitors	23
2.7.3 Retinoids	23
2.7.4 Systemic Immunosuppressive Agents	24
2.7.5 Biologics	25
2.7.6 Antihistamines	25
2.7.7 Hormonal Therapy	26
2.7.8 Moisturizers	26
3 Key Marketed Products	27
3.1 Overview	27
3.2 Humira (adalimumab) - AbbVie	27
3.3 Remicade (infliximab) - Johnson & Johnson	29
3.4 Enbrel (etanercept) - Amgen	31
3.5 Stelara (ustekinumab) - Johnson & Johnson	33
3.6 Neoral (cyclosporine) - Novartis	34
3.7 Protopic (tacrolimus) - Astellas Pharma	36
3.8 Cosentyx (Secukinumab) - Novartis	37
3.9 Dupixent (dupilumab) Sanofi and Regeneron	39
3.10 Taltz (ixekizumab) - Eli Lilly	41
3.11 Eucrisa (crisaborole) - Pfizer	43
3.12 Siliq (Brodalumab) - Valeant Pharmaceuticals	44

- 3.13 Elidel (pimecrolimus) 46
- 3.14 Elocon (mometasone furoate) 46
- 3.15 Differin (adapalene) 47
- 3.16 Metolate (methotrexate) 48
- 3.17 Clobex (clobetasol propionate) 48
- 3.18 Conclusion 49

4 Pipeline Landscape Assessment 50

- 4.1 Overview 50
- 4.2 Molecule Types in the Pipeline 53
- 4.3 Molecular Targets in the Pipeline 54
- 4.4 Clinical Trials 56
 - 4.4.1 Failure Rate by Stage of Development, Indication, Molecule Type and Molecular Target 57
 - 4.4.2 Clinical Trial Duration by Stage of Development, Indication, Molecule Type and Molecular Target 61
 - 4.4.3 Clinical Trial Size by Stage of Development, Indication, Molecule Type and Molecular Target 65
 - 4.4.4 Aggregate Clinical Program Size by Stage of Development, Indication, Molecule Type and Molecular Target 69
 - 4.4.5 Assessment of Key Pipeline Products 72
- 4.5 Conclusion 78

5 Multi-scenario Market Forecast to 2023 79

- 5.1 Overall Market Size 79
- 5.2 Generic Penetration 81
- 5.3 Revenue Forecast by Molecular Target 82
 - 5.3.1 Tumor Necrosis Factor-Alpha 82
 - 5.3.2 Interleukins 1, 4, 5, 12, 17 and 23 and Receptors 83
 - 5.3.3 Calcineurin 85
 - 5.3.4 Glucocorticoid Receptors 86
 - 5.3.5 Phosphodiesterase 4 87

6 Company Analysis and Positioning 88

- 6.1 Revenue and Market Share Analysis by Company 89
 - 6.1.1 Novartis - Will Revenue from Cosentyx Continue to Increase in the Forecast Period? 94
 - 6.1.2 AbbVie - Will Humira's Patent Expiry Lead to Loss of Market Leadership? 95

- 6.1.3 Johnson & Johnson - Guselkumab and Stelara Fail to Offset Revenue Lost from Remicade 96
- 6.1.4 Sanofi - High Revenue Growth from Dupixent Will See Sanofi's Revenue from the Dermatology Therapy Area Increase 97
- 6.1.5 Pfizer - Approval of Eucrisa to Drive Growth in the Dermatology Therapy Area 98
- 6.1.6 Celgene - Otezla Expected to Achieve Blockbuster Status in the Therapy Area 99
- 6.2 Company Landscape 100
- 6.3 Marketed and Pipeline Portfolio Analysis 102

7 Strategic Consolidations 104

- 7.1 Licensing Deals 104
 - 7.1.1 Deals by Region, Year and Value 104
 - 7.1.2 Deals by Stage of Development and Value 107
 - 7.1.3 Deals by Molecule Type, Mechanism of Action and Value 107
 - 7.1.4 Figures for Licensing Deals Valued Above \$100m 109
- 7.2 Co-development Deals 112
 - 7.2.1 Deals by Region, Year and Value 112
 - 7.2.2 Deals by Stage of Development and Value 115
 - 7.2.3 Deals by Molecule Type, Mechanism of Action and Value 116
 - 7.2.4 Figures for Co-development Deals Valued Above \$100m 117

8 Appendix 119

- 8.1 References 119
- 8.2 Table of Epidemiology Forecast 125
- 8.3 Figure of All Clinical Stage Psoriasis ,Atopic dermatitis and Acne vulgaris Pipeline Products 126
- 8.4 Abbreviations 133
- 8.5 Disease List 134
- 8.6 Methodology 134
 - 8.6.1 Coverage 134
 - 8.6.2 Secondary Research 134
 - 8.6.3 Market Size and Revenue Forecasts 135
 - 8.6.4 Pipeline Analysis 135
 - 8.6.5 Competitive Landscape 136
- 8.7 Contact Us 136
- 8.8 Disclaimer 136

Table 1: Dermatology, Global, Classification of Atopic Dermatitis Severity and Impact on Quality of Life 16

Table 2: Dermatology, Global, European Dermatology Forum Acne Vulgaris Classification 16

Table 3: Dermatology, Global, Classification of Acne Vulgaris Severity 17

Table 4: Dermatology, Global, Classification of Psoriasis Severity 17

Table 5: Dermatology, Global, Epidemiology of Dermatological Disorders, 2016 18

Table 6: Dermatology Therapeutics Market, Global, Approved Dermatology Indications for Humira, 2017 28

Table 7: Dermatology Therapeutics Market, Global, Approved Dermatology Indications for Remicade, 2017 29

Table 8: Dermatology Therapeutics Market, Global, Approved Dermatology Indications for Enbrel, 2017 31

Table 9: Dermatology Therapeutics Market, Global, Approved Dermatology Indications for Stelara, 2017 33

Table 10: Dermatology Therapeutics Market, Global, Approved Dermatology Indications for Neoral, 2017 35

Table 11: Dermatology Therapeutics Market, Global, Approved Dermatology Indications for Protopic, 2017 36

Table 12: Dermatology Therapeutics Market, Global, Approved Dermatology Indications for Cosentyx, 2017 38

Table 13: Dermatology Therapeutics Market, Global, Approved Dermatology Indications for Dupixent, 2017 39

Table 14: Dermatology Therapeutics Market, Global, Approved Dermatology Indications for Taltz, 2017 41

Table 15: Dermatology Therapeutics Market, Global, Approved Dermatology Indications for Eucrisa, 2017 43

Table 16: Dermatology Therapeutics Market, Global, Approved Dermatology Indications for Siliq, 2017 44

Table 17: Dermatology Therapeutics Market, Global, Approved Dermatology Indications for Elidel, 2015 46

Table 18: Dermatology Therapeutics Market, Global, Approved Dermatology Indications for Elocon, 2015 46

Table 19: Dermatology Therapeutics Market, Global, Approved Dermatology Indications for Differin, 2015 47

Table 20: Dermatology Therapeutics Market, Global, Approved Dermatology Indications for Metolate, 2017 48

Table 21: Dermatology Therapeutics Market, Global, Approved Dermatology Indications for Clobex, 2017 49

Table 22: Dermatology Therapeutics Market, Global, Annual Revenue Forecast for Key Products (\$bn), 2016-2023 80

Table 23: Dermatology, Global, Usage of Generics Across Key Indications, 2017 82

Table 24: Dermatology Therapeutics Market, Global, Forecast Revenue by Company, 2016-2023 90

Table 25: Epidemiology Patterns for Atopic Dermatitis, 2015-2022 125

Table 26: Epidemiology Patterns for Acne Vulgaris, 2015-2022 125

Table 27: Epidemiology Patterns for Psoriasis, 2015-2022 125

Table 28: Abbreviations 133

Figure 1: Epidemiology Patterns for Atopic Dermatitis (million), 2016-2023 19

Figure 2: Epidemiology Patterns for Acne Vulgaris (million), 2016-2023 20

Figure 3: Epidemiology Patterns for Psoriasis (million), 2016-2023 21

Figure 4: Dermatology, Global, Key Marketed Products and Approved Indications, 2017 27

- Figure 5: Dermatology Therapeutics Market, Global, Annual Revenue for Humira (\$bn), 2006-2023 29
- Figure 6: Dermatology Therapeutics Market, Global, Johnson & Johnson's Annual Revenue for Remicade (\$bn), 2006-2023 30
- Figure 7: Dermatology Therapeutics Market, Global, Merck & Co.'s Annual Revenue for Remicade (\$bn), 2010-2023 31
- Figure 8: Dermatology Therapeutics Market, Global, Amgen's Annual Revenue for Enbrel (\$bn), 2006-2023 32
- Figure 9: Dermatology Therapeutics Market, Global, Pfizer's Annual Revenue for Enbrel (\$bn), 2010-2023 33
- Figure 10: Dermatology Therapeutics Market, Global, Annual Revenue for Stelara (\$bn), 2010-2023 34
- Figure 11: Dermatology Therapeutics Market, Global, Annual Revenue for Neoral (\$m), 2006-2023 36
- Figure 12: Dermatology Therapeutics Market, Global, Annual Revenue for Protopic (\$m), 2006-2015 37
- Figure 13: Dermatology Therapeutics Market, Global, Revenue Forecast for Cosentyx (\$bn), 2016-2023 39
- Figure 14: Dermatology Therapeutics Market, Global, Revenue Forecast for Dupilumab (\$bn), 2017-2023 40
- Figure 15: Dermatology Therapeutics Market, Global, Revenue Forecast for Taltz (\$bn), 2017-2023 41
- Figure 16: Dermatology Therapeutics Market, Global, Revenue Forecast for Taltz (\$bn), 2016-2023 42
- Figure 17: Dermatology Therapeutics Market, Global, Revenue Forecast for Eucrisa (\$bn), 2016-2023 44
- Figure 18: Dermatology Therapeutics Market, Global, Revenue Forecast for AMG-827 (\$m), 2016-2022 45
- Figure 19: Dermatology Therapeutics Market, Global, Overall Pharmaceutical Industry Pipeline by Therapy Area, 2017 50
- Figure 20: Dermatology Therapeutics Market, Global, Pipeline for Dermatology by Stage of Development, Molecule Type and Program Type, 2017 52
- Figure 21: Dermatology Therapeutics Market, Global, Pipeline for Key Dermatology Indications by Stage of Development, 2017 53
- Figure 22: Dermatology Therapeutics Market, Global, Pipeline for Key Dermatology Indications by Molecule Type, 2017 54
- Figure 23: Dermatology Therapeutics Market, Global, Pipeline for Dermatology by Molecular Target, 2017 55
- Figure 24: Dermatology Therapeutics Market, Global, Pipeline for Dermatology by Molecular Target, 2017 55
- Figure 25: Dermatology Therapeutics Market, Global, Pipeline for Key Dermatology Indications by Molecular Target, 2017 56
- Figure 26: Dermatology Therapeutics Market, Global, Clinical Trial Attrition Rates by Stage of Development (%), 2006-2017 57
- Figure 27: Dermatology Therapeutics Market, Global, Clinical Trial Attrition Rates by Stage of Development and Indication (%), 2006-2016 58
- Figure 28: Dermatology Therapeutics Market, Global, Clinical Trial Attrition Rates by Stage of Development and Molecule Type (%), 2006-2016 59

Figure 29: Dermatology Therapeutics Market, Global, Clinical Trial Attrition Rates by Stage of Development and Molecular Target (%), 2006-2016 60

Figure 30: Dermatology Therapeutics Market, Global, Clinical Trial Duration by Stage of Development (months), 2006-2017 61

Figure 31: Dermatology Therapeutics Market, Global, Clinical Trial Duration by Stage of Development and Indication (months), 2006-2017 62

Figure 32: Dermatology Therapeutics Market, Global, Clinical Trial Duration by Stage of Development and Molecule Type (months), 2006-2016 63

Figure 33: Dermatology Therapeutics Market, Global, Clinical Trial Duration by Stage of Development and Molecular Target (months), 2006-2016 64

Figure 34: Dermatology Therapeutics Market, Global, Clinical Trial Size by Stage of Development (patients), 2006-2016 65

Figure 35: Dermatology Therapeutics Market, Global, Clinical Trial Size by Stage of Development and Indication (participants), 2006-2016 66

Figure 36: Dermatology Therapeutics Market, Global, Clinical Trial Size by Stage of Development and Molecule Type (participants), 2006-2016 67

Figure 37: Dermatology Therapeutics Market, Global, Clinical Trial Size by Stage of Development and Molecular Target (participants), 2006-2016 68

Figure 38: Dermatology Therapeutics Market, Global, Clinical Program Size by Stage of Development (months), 2006-2016 69

Figure 39: Dermatology Therapeutics Market, Global, Clinical Program Size by Stage of Development and Indication (participants), 2006-2016 70

Figure 40: Dermatology Therapeutics Market, Global, Clinical Program Size by Stage of Development and Molecule Type (participants), 2006-2016 71

Figure 41: Dermatology Therapeutics Market, Global, Clinical Program Size by Stage of Development and Molecular Target (participants), 2006-2017 72

Figure 42: Dermatology Therapeutics Market, Global, Revenue Forecast for Risankizumab (\$m), 2016-2022 73

Figure 43: Dermatology Therapeutics Market, Global, Revenue Forecast for Zorblisa (\$m), 2017-2023 75

Figure 44: Dermatology Therapeutics Market, Global, Revenue Forecast for Olumacostat glasaretil (\$m), 2019-2023 76

Figure 45: Dermatology Therapeutics Market, Global, Revenue Forecast for Guselkumab (\$m), 2016-2022 77

Figure 46: Dermatology Global, Market Size (\$bn), 2016-2023 79

Figure 47: Dermatology Global, Annual Revenue Forecast for Key Products (\$bn), 2016-2023 81

Figure 48: Dermatology, Global, Annual Revenue Forecast for Tumor Necrosis Factor-Alpha Inhibitors (\$bn),

2016-2023 83

Figure 49: Dermatology, Global, Annual Revenue Forecast for Interleukin Inhibitors (\$bn), 2015-2022 84

Figure 50: Dermatology, Global, Annual Revenue Forecast for Calcineurin Inhibitors (\$bn), 2015-2022 85

Figure 51: Dermatology, Global, Annual Revenue Forecast for Glucocorticosteroids (\$m), 2015-2022 86

Figure 52: Dermatology, Global, Annual Revenue Forecast for Phosphodiesterase 4 inhibitors (\$bn), 2015-2023
87

Figure 53: Dermatology Therapeutics Market, Global, Cluster by Growth and Market Share, 2016-2023 88

Figure 54: Dermatology Therapeutics Market, Global, Forecast Market Share by Company (%), 2016-2023 92

Figure 55: Dermatology, Global, Companies by Compound Annual Growth Rate (%), 2016-2023 93

Figure 56: Dermatology, Global, Revenues by Product Type, 2016-2023 94

Figure 57: Dermatology, Global, Novartis, Annual Revenue Forecast (\$bn), 2016-2023 95

Figure 58: Dermatology, Global, AbbVie Annual Revenue Forecast (\$bn), 2016-2023 96

Figure 59: Dermatology, Global, Johnson & Johnson Annual Revenue Forecast (\$bn), 2015-2022 97

Figure 60: Dermatology, Global, Sanofi, Annual Revenue Forecast (\$bn), 2015-2022 98

Figure 61: Dermatology, Global, Pfizer Annual Revenue Forecast (\$bn), 2015-2022 99

Figure 62: Dermatology, Global, Celgene Annual Revenue Forecast (\$bn), 2016-2023 100

Figure 63: Dermatology, Global, Companies by Type, 2017 101

Figure 64: Dermatology, Global, Pipeline, High-Activity and Late-Stage Developers by Level of Dermatology
Specialization, 2017 102

Figure 65: Dermatology, Global, Proportion of Total Company Revenue Attributed to Dermatology, 2015-2022 103

Figure 66: Dermatology, Global, Licensing Deals, 2006-2017 105

Figure 67: Dermatology, Global, Licensing Deals by Indication, 2006-2017 106

Figure 68: Dermatology, Global, Licensing Deals, 2006-2017 107

Figure 69: Dermatology, Global, Licensing Deals by Molecule Type and Mechanism of Action, 2006-2017 108

Figure 70: Dermatology Therapeutics Market, Global, Licensing Deals, 2006-2017 (Part 1) 109

Figure 71: Dermatology Therapeutics Market, Global, Licensing Deals, 2006-2017 (Part 2) 110

Figure 72: Dermatology Therapeutics Market, Global, Licensing Deals, 2006-2017 (Part 3) 111

Figure 73: Dermatology Therapeutics Market, Global, Licensing Deals, 2006-2017 (Part 4) 112

Figure 74: Dermatology, Global, Co-development Deals, 2006-2017 113

Figure 75: Dermatology, Global, Co-development Deals by Indication, 2006-2017 114

Figure 76: Dermatology, Global, Co-development Deals, 2006-2017 115

Figure 77: Dermatology, Global, Co-development Deals by Molecule Type and Mechanism of Action, 2006-2017
116

Figure 78: Dermatology Therapeutics Market, Global, Co-development Deals, 2006-2017 (Part 1) 117

- Figure 79: Dermatology Therapeutics Market, Global, Co-development Deals, 2006-2017 (Part 2) 117
- Figure 80: Dermatology Therapeutics Market, Global, Co-development Deals, 2006-2017 (Part 3) 117
- Figure 81: Dermatology Therapeutics Market, Global, Co-development Deals, 2006-2017 (Part 4) 118
- Figure 82: Dermatology, Global, Table of all Clinical Stage Pipeline Products, 2016 Part 1 126
- Figure 83: Dermatology, Global, Table of all Clinical Stage Pipeline Products, 2016 Part 2 127
- Figure 84: Dermatology, Global, Table of all Clinical Stage Pipeline Products, 2016 Part 3 128
- Figure 85: Dermatology, Global, Table of all Clinical Stage Pipeline Products, 2016 Part 4 129
- Figure 86: Dermatology, Global, Table of all Clinical Stage Pipeline Products, 2016 Part 5 130
- Figure 87: Dermatology, Global, Table of all Clinical Stage Pipeline Products, 2016 Part 6 131
- Figure 88: Dermatology, Global, Table of all Clinical Stage Pipeline Products, 2016 Part 7 132

Buy This Report

Single License : \$ 4995

Request sample of this
report

Check discount this
report

BUY NOW



REQUEST SAMPLE



CHECK DISCOUNT



Go For Report

<https://www.marketresearchreports.biz/reports/1287797/global-dermatology-drugs-to-market-research-reports>

Office: United States

State Tower, 90 State Street, Suite 700, Albany,
NY 12207, United States

Toll Free: 866-997-4948 (USA-Canada)

Tel: +1-518-621-2074

E: sales@marketresearchreports.biz