

Global Hidradenitis Suppurativa Market: Analysis By Patients, By Drugs (Povorcitinib, Bimekizumab, Sonelokimab), By Region Size (The US, Europe, Rest of the World) & Forecast with Impact Analysis of COVID-19 and Forecast up to 2030

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Abstracts

Hidradenitis Suppurativa, according to the National Organization of Rare Disorders, is a chronic disorder characterized by swelling, painful lesions in the armpit, groin, anal, and breast regions. It is a painful and long-term skin ailment that causes abscesses and scars. Patients with this ailment may present with acute abscesses, but it frequently evolves to a chronic state with persistent discomfort, sinus tract fistula formation, and scarring. Disease severity is stratified using the Hurley staging system: Stage I involves abscess formation without sinus tracts or scarring; Stage II involves recurrent abscesses with sinus tracts and scarring; and Stage III involves diffuse or multiple interconnected sinus tracts and abscesses. In 2022, the global hidradenitis suppurativa market was valued at US\$1.46 billion, and is probable to reach US\$2.24 billion by 2030.

The only FDA-approved treatment for HS is AbbVie's anti-TNF antibody Humira (adalimumab). The drug was approved based on results from two pivotal Phase III studies (PIONEER I and PIONEER II), in which 633 patients (n=307 in PIONEER I and n=326 in PIONEER 2) with moderate to severe HS were randomized to receive Humira or placebo weekly in addition to daily topical antiseptic. Technology advanced treatments such as laser surgeries would boost hidradenitis suppurativa treatment market growth in the near future. Furthermore, FDA approvals for drugs delivery and clinical trials are propelling the hidradenitis suppurativa market growth. The global hidradenitis suppurativa market is projected to grow at a CAGR of 5.50%, during the forecast period of 2023-2030.

Market Segmentation Analysis:

By Region: The report provides insight into the global hidradenitis suppurativa market based on the geographical operations, namely the US, Europe and Rest of the World. The US dominates the hidradenitis suppurativa market because of the surging adoption of newer techniques in this region. Additionally, growing presence of major key players such as Pfizer Inc., Eli Lilly and Company, AbbVie Inc., Incyte Corporation, etc., and well-established healthcare infrastructure will further propel the market's growth rate in this region.

By Patient: According to the report, the US hidradenitis suppurativa market is segmented into the patients with Stage II and Stage III hidradenitis suppurativa. Obesity, smoking, and a sedentary lifestyle in the US would lead to an increase in Stage II and Stage III hidradenitis suppurativa patients. Additionally, hidradenitis suppurativa has a hereditary component, and those with a family history of the illness are more likely to develop it. The data also shows the total number of treated patients in the US over the anticipated timeframe.

By Drugs: The report includes expected data for three medications in the US: povorcitinib, bimekizumab, and sonelokimab. Povorcitinib, Bimekizumab, and Sonelokimab are the next drugs being developed by Incyte Corporation, UCB S.A., and Moonlake Immunotherapeutics, through that order, and are slated to launch by 2027, 2024, and 2024, respectively, as studies to treat hidradenitis suppurativa are ongoing. The medications would be used to treat the skin ailment hidradenitis suppurativa. The report also forecasts the number of patients treated for these three medications during the anticipated timeframe.

Global Hidradenitis Suppurativa Market Dynamics:

Growth Drivers: Obesity is linked to a more severe form of hidradenitis suppurativa disease, which might lead to a rise in the need for medical attention and care. The market for hidradenitis suppurativa therapies might expand as a result of this. Obesity is a modifiable risk factor, and there may be increased focus on lifestyle interventions, such as weight loss, diet modification, and exercise, as a way to manage HS. Further, the market is expected to increase due to increased disposable income, aging population, rapid urbanization, rise in the incidence of skin diseases, increase in smoking rates, etc.

Challenges: Unmet medical needs and drug resistance can become a challenge for

hidradenitis suppurativa as there is currently no cure for hidradenitis suppurativa, a chronic and crippling skin condition that can be difficult to treat. The symptoms of the disease, which can include painful nodules, abscesses, and scarring, cause a significant reduction in quality of life for many hidradenitis suppurativa patients. The other challenge that hidradenitis suppurativa market faces is high cost, delays in treatment completion, etc.

Trends: A major trend gaining pace in hidradenitis suppurativa market is use of Artificial Intelligence (AI) in Vaccine and Drug Design. Artificial intelligence (AI) has the potential to improve the diagnosis and management of hidradenitis suppurativa (HS). AI algorithms can be trained to recognize the characteristic lesions and scars associated with hidradenitis suppurativa on medical images such as photographs, ultrasound, and MRI scans. This can help with early diagnosis and accurate tracking of disease progression. More trends in the market are believed to augment the growth of hidradenitis suppurativa market during the forecasted period include advancement of technological, surging drug approvals and launches, etc.

Impact Analysis of COVID-19 and Way Forward:

The financial crisis and the decision to prioritize COVID-19-related therapies while delaying the provision of specialty healthcare have severely disturbed the global healthcare system. Patients were unable to seek treatment for hidradenitis suppurativa for a variety of reasons, including difficulties finding a doctor, concern about transmitting infection, and inability to continue medications and essential procedures owing to pandemic restrictions. During the pandemic, such circumstances were detrimental to the hidradenitis suppurativa industry. **Competitive Landscape and Recent Developments:**

Global hidradenitis suppurativa market is dominated by AbbVie Inc., whose product Humira is the sole FDA-approved medicine for the treatment of hidradenitis suppurativa. Key players of global hidradenitis suppurativa market are:

Pfizer Inc.

Eli Lilly and Company

AbbVie Inc.

UCB S.A.

Incyte Corporation

Novartis AG

Boehringer Ingelheim

Aclaris Therapeutics, Inc.

InflaRx N.V.

Moonlake Immunotherapeutics

Acelyrin, Inc.

Kymera Therapeutics, Inc

The key players are constantly investing in strategic initiatives, such as new product launches, introducing their products to emerging markets and more, to maintain a competitive edge in this market. For instance, in December 2022, Kymera announced positive results from Phase 1 clinical trials evaluating KT-474 in patients suffering from hidradenitis suppurativa and atopic dermatitis, after which Sanofi decided to advance KT-474 into Phase 2 clinical trials for which IND is cleared by the US FDA. Also, in December 2022, UCB reported positive data from the BE HEARD I and BE HEARD II Phase 3 clinical trials of bimekizumab in moderate to severe hidradenitis suppurativa adult patients.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Hidradenitis Suppurativa: An Overview

2.1.1 Hidradenitis Suppurativa Overview

2.1.2 The Hurley Staging System in Hidradenitis Suppurativa (HS)

3. GLOBAL MARKET ANALYSIS

3.1 Global Hidradenitis Suppurativa Market: An Analysis

3.1.1 Global Hidradenitis Suppurativa Market: An Overview

3.1.2 Global Hidradenitis Suppurativa Market by Value

3.1.3 Global Hidradenitis Suppurativa Market by Region (The US, Europe, and Rest of the World)

3.2 The US Hidradenitis Suppurativa Market: An Analysis

3.2.1 The US Hidradenitis Suppurativa Market: An Overview

3.2.2 The US Hidradenitis Suppurativa Market by Value

3.3 Europe Hidradenitis Suppurativa Market: An Analysis

3.3.1 Europe Hidradenitis Suppurativa Market: An Overview

3.3.2 Europe Hidradenitis Suppurativa Market by Value

3.3.3 Europe Hidradenitis Suppurativa Market by Region (Germany, UK and Rest of Europe)

3.3.4 Germany Hidradenitis Suppurativa Market by Value

3.3.5 UK Hidradenitis Suppurativa Market by Value

3.3.6 Rest of Europe Hidradenitis Suppurativa Market by Value

3.4 Rest of the World Hidradenitis Suppurativa Market: An Analysis

3.4.1 Rest of the World Hidradenitis Suppurativa Market: An Overview

3.4.2 Rest of the World Hidradenitis Suppurativa Market by Value

4. THE US MARKET ANALYSIS

4.1 The US Hidradenitis Suppurativa Market: Patient Analysis

4.1.1 The US Hidradenitis Suppurativa Market: Patients Overview

4.1.2 The US Stage II Hidradenitis Suppurativa Market by Patients

4.1.3 The US Stage III Hidradenitis Suppurativa Market by Patients

4.1.4 The US Hidradenitis Suppurativa Market by Treated Patients

- 4.2 The US Povorcitinib Hidradenitis Suppurativa Market: An Analysis
 - 4.2.1 The US Povorcitinib Hidradenitis Suppurativa Market: An Overview
 - 4.2.2 The US Povorcitinib Hidradenitis Suppurativa Market by Treated Patients
 - 4.2.3 The US Povorcitinib Hidradenitis Suppurativa Market by Value
- 4.3 The US Bimekizumab Hidradenitis Suppurativa Market: An Analysis
 - 4.3.1 The US Bimekizumab Hidradenitis Suppurativa Market: An Overview
 - 4.3.2 The US Bimekizumab Hidradenitis Suppurativa Market by Treated Patients
 - 4.3.3 The US Bimekizumab Hidradenitis Suppurativa Market by Value
- 4.4 The US Sonelokimab Hidradenitis Suppurativa Market: An Analysis
 - 4.4.1 The US Sonelokimab Hidradenitis Suppurativa Market: An Overview
 - 4.4.2 The US Sonelokimab Hidradenitis Suppurativa Market by Treated Patients
 - 4.4.3 The US Sonelokimab Hidradenitis Suppurativa Market by Value

5. IMPACT OF COVID-19

- 5.1 Impact of COVID-19
 - 5.1.1 Impact of COVID-19 on Hidradenitis Suppurativa Market
 - 5.1.2 Post COVID-19 Impact

6. MARKET DYNAMICS

- 6.1 Growth Drivers
 - 6.1.1 Increased Disposable Income
 - 6.1.2 Rising Cases of Obesity
 - 6.1.3 Rapid Urbanization
 - 6.1.4 Increase in Smoking Rates
 - 6.1.5 Rise in The Incidence Of Skin Diseases
 - 6.1.6 Rising Prevalence of Hidradenitis Suppurativa
- 6.2 Challenges
 - 6.2.1 High Cost
 - 6.2.2 Unmet Medical Needs and Drug Resistance
 - 6.2.3 Delays in Treatment Completion
- 6.3 Market Trends
 - 6.3.1 Use of Artificial Intelligence (AI) in Vaccine and Drug Design
 - 6.3.2 Technological Advancements
 - 6.3.3 Surging Drug Approvals and Launches

7. COMPETITIVE LANDSCAPE

- 7.1 Global Hidradenitis Suppurativa Market Players: Current HS Pipeline Comparison
- 7.2 Global HS Market Players: HS Trial Design and Patient Population Comparison

8. COMPANY PROFILES

8.1 Pfizer Inc.

- 8.1.1 Business Overview
- 8.1.2 Operating Segments
- 8.1.3 Business Strategies

8.2 Eli Lilly and Company

- 8.2.1 Business Overview
- 8.2.2 Revenue by Products
- 8.2.3 Business Strategy

8.3 AbbVie Inc.

- 8.3.1 Business Overview
- 8.3.2 Operating Regions
- 8.3.3 Business Strategy

8.4 UCB S.A.

- 8.4.1 Business Overview
- 8.4.2 Net Sales by Products
- 8.4.3 Business Strategy

8.5 Incyte Corporation

- 8.5.1 Business Overview
- 8.5.2 Revenue by Products
- 8.5.3 Business Strategy

8.6 Novartis AG

- 8.6.1 Business Overview
- 8.6.2 Operating Segments
- 8.6.3 Business Strategy

8.7 Boehringer Ingelheim

- 8.7.1 Business Overview
- 8.7.2 Operating Business
- 8.7.3 Business Strategy

8.8 Aclaris Therapeutics, Inc.

- 8.8.1 Business Overview
- 8.8.2 Operating Segments
- 8.8.3 Business Strategy

8.9 InflaRx N.V.

- 8.9.1 Business Overview

- 8.9.2 Business Strategy
- 8.10 Moonlake Immunotherapeutics
 - 8.10.1 Business Overview
 - 8.10.2 Business Strategy
- 8.11 Acelyrin, Inc.
 - 8.11.1 Business Overview
 - 8.11.2 Business Strategy
- 8.12 Kymera Therapeutics, Inc.
 - 8.12.1 Business Overview
 - 8.12.2 Business Strategy

List Of Figures

LIST OF FIGURES

- Figure 1: The Hurley Staging System in Hidradenitis Suppurativa (HS)
- Figure 2: Global Hidradenitis Suppurativa Market by Value; 2018-2022 (US\$ Billion)
- Figure 3: Global Hidradenitis Suppurativa Market by Value; 2023-2030 (US\$ Billion)
- Figure 4: Global Hidradenitis Suppurativa Market by Region; 2022 (Percentage, %)
- Figure 5: The US Hidradenitis Suppurativa Market by Value; 2018-2022 (US\$ Million)
- Figure 6: The US Hidradenitis Suppurativa Market by Value; 2023-2030 (US\$ Billion)
- Figure 7: Europe Hidradenitis Suppurativa Market by Value; 2018-2022 (US\$ Million)
- Figure 8: Europe Hidradenitis Suppurativa Market by Value; 2023-2030 (US\$ Million)
- Figure 9: Europe Hidradenitis Suppurativa Market by Region; 2022 (Percentage, %)
- Figure 10: Germany Hidradenitis Suppurativa Market by Value; 2018-2022 (US\$ Million)
- Figure 11: Germany Hidradenitis Suppurativa Market by Value; 2023-2030 (US\$ Million)
- Figure 12: UK Hidradenitis Suppurativa Market by Value; 2018-2022 (US\$ Million)
- Figure 13: UK Hidradenitis Suppurativa Market by Value; 2023-2030 (US\$ Million)
- Figure 14: Rest of Europe Hidradenitis Suppurativa Market by Value; 2018-2022 (US\$ Million)
- Figure 15: Rest of Europe Hidradenitis Suppurativa Market by Value; 2023-2030 (US\$ Million)
- Figure 16: Rest of the World Hidradenitis Suppurativa Market by Value; 2018-2022 (US\$ Million)
- Figure 17: Rest of the World Hidradenitis Suppurativa Market by Value; 2023-2030 (US\$ Million)
- Figure 18: The US Stage II Hidradenitis Suppurativa Market by Patients; 2022-2030 (Thousand, Percentage, %)
- Figure 19: The US Stage III Hidradenitis Suppurativa Market by Patients; 2022-2030 (Thousand, Percentage, %)
- Figure 20: The US Hidradenitis Suppurativa Market by Treated Patients; 2022-2030 (Thousand)
- Figure 21: The US Povorcitinib Hidradenitis Suppurativa Market by Treated Patients; 2027-2030 (Number)
- Figure 22: The US Povorcitinib Hidradenitis Suppurativa Market by Value; 2027-2030 (US\$ Million)
- Figure 23: The US Bimekizumab Hidradenitis Suppurativa Market by Treated Patients; 2024-2030 (Number)
- Figure 24: The US Bimekizumab Hidradenitis Suppurativa Market by Value; 2024-2030 (US\$ Million)

Figure 25: The US Sonelokimab Hidradenitis Suppurativa Market by Treated Patients; 2027-2030 (Number)

Figure 26: The US Sonelokimab Hidradenitis Suppurativa Market by Value; 2027-2030 (US\$ Million)

Figure 27: Global GNI per Capita; 2016-2021 (US\$ Million)

Figure 28: Global Numbers Of People With Obesity And Severe Obesity, 2010-2030 (Million)

Figure 29: Global Urban Population; 2016, 2021 & 2050 (Billion)

Figure 30: Global Market Size for Artificial Intelligence in Healthcare; 2021-2030 (US \$Billion)

Figure 31: Pfizer Inc. Revenues by Operating Segments; 2022 (Percentage, %)

Figure 32: Eli Lilly and Company Revenue by Products; 2022 (Percentage, %)

Figure 33: AbbVie Inc. Net revenue by regions; 2022 (Percentage, %)

Figure 34: UCB S.A. Net Sales by Products; 2022 (Percentage, %)

Figure 35: Incyte Corporation Revenue by Products; 2021 (Percentage, %)

Figure 36: Novartis AG Net Sales by Segments; 2022 (Percentage, %)

Figure 37: Boehringer Ingelheim Net Sales by Business; 2021 (Percentage, %)

Figure 38: Aclaris Therapeutics, Inc. Revenue by Segments; 2022 (Percentage, %)

Table 1: Global Hidradenitis Suppurativa Market Players: Current HS Pipeline Comparison

Table 2: Global HS Market Players: HS Trial Design and Patient Population Comparison

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