

Acne Drugs Market Size, Share & Trends Analysis Report By Type, By Therapeutic Class (Retinoid, Antibiotic, Combination), By Mode of Administration (Injectable, Topical, Oral), And Segment Forecasts, 2018 - 2025

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Abstracts

The global acne drugs market size is expected to reach USD 5.9 billion by 2025, according to a new report by Grand View Research, Inc., registering a 4.2% CAGR during the forecast period. Several factors such as emergence of biologics, unhealthy lifestyle, and rising disease incidence are anticipated to drive the market.

Acne vulgaris is one of the most common dermatological disorders, affecting 9.4% people worldwide. Although the condition can affect people of all ages, it is most prevalent among teenagers. It has been found that the condition is prevalent in more than 85.0% people between the ages of 12 and 25. Acne can appear in forms ranging from comedones to cystic lesions, depending on its severity.

Retinoids and antibiotics remain the mainstays of acne treatment. Retinoids led the therapeutic classes in 2017, and it is expected to continue this trend through 2025. The therapeutic landscape is witnessing a shift toward combination treatment due to higher efficacy, convenient dosing, and fewer adverse effects.

By mode of administration, topical drugs currently dominate the market. Severe cases see the use of systemic medications such as oral antibiotics, hormonal agents, or other drugs. However, emergence of biologics (Gevokizumab and RA-18C3) will fuel the injectable route of administration. Biologics offer improved clinical advantage over conventional topical treatments since they target inflammatory mechanisms with disease modifying ability.

Discontinuation or termination of key pipeline candidates on account of unsuccessful clinical trials is a major restraint this market faces. Upon launch, Olumacostat glasaretil (Dermira; topical lipid synthesis inhibitor) was expected to be the first topical anti-acne drug with isotretinoin-like results without significant side effects. However, the drug failed to meet clinical endpoints, leading to discontinuation in March 2018. Similarly, SNA-001 (Sienna; silver nanoparticles solution) was deemed unsuccessful in two key trials wherein it was tested in conjunction with 810nm and 1064nm lasers in July 2018. Thesan withdrew TSN2898 from Phase II trials due to drug unavailability. Xenon discontinued development of XEN801 after the drug failed Phase II clinical trials.

Despite being one of the most common dermatological diseases in the world, innovation in acne treatment has been rather limited over the past decade. Drug companies are currently exploring novel treatment approaches including stearyl CoA desaturase inhibition, melanocortin receptor antagonism, and anti-IL-1 monoclonal antibodies. Impending launch of late-stage pipeline products indicate a promising future for the global acne drugs market.

Further key findings from the report suggest:

By type, inflammatory acne captured more than 50.0% of the market in 2017. Comedonal acne were ranked second-largest, among other types

On the basis of therapeutic class, retinoids led the market in 2017, followed by antibiotics. This trend is likely to continue through 2025

The treatment paradigm is shifting toward combination therapies and biologics. Combination products are gaining traction due to higher efficacy, convenient dosing, and fewer adverse effects

Topical products dominated the treatment landscape, based on mode of administration. However, introduction of biologics is likely to result in the growth of the injectables segment

U.S. dominated the major markets and is projected to maintain its lead through 2025, owing to rising disease incidence and ease of access to anti-acne products

Allergan, Bayer, Galderma, Stiefel, and Valeant are some key players operating

in this market. Valeant is projected to lead the market in 2025 due to higher adoption of Retin-A micro as well as anticipated launch of pipeline candidates.

Contents

CHAPTER 1 METHODOLOGY AND SCOPE

- 1.1 Research Methodology
- 1.2 Research Scope and Assumptions
- 1.3 List to Data Sources
- 1.4 List of Abbreviations

CHAPTER 2 EXECUTIVE SUMMARY

CHAPTER 3 DISEASE PRIMER AND EPIDEMIOLOGY

- 3.1 Disease Primer
 - 3.1.1 Forms
 - 3.1.2 Causative Factors and Triggers
 - 3.1.3 Degree of Severity
- 3.2 Epidemiology
- 3.3 Current Prevalence and Incidence for Seven Major Markets (U.S., Japan, EU5)
- 3.4 Forecast Prevalence and Incidence for Seven Major Markets (U.S., Japan, EU5)

CHAPTER 4 GLOBAL ACNE DRUGS MARKET OVERVIEW

- 4.1 Introduction and Market Overview
 - 4.1.1 Segmentation, by type
 - 4.1.1.1 Comedonal
 - 4.1.1.2 Inflammatory
 - 4.1.1.3 Cystic
 - 4.1.1.4 Post-Surgical/wound
 - 4.1.2 Segmentation, by therapeutic class
 - 4.1.2.1 Retinoid
 - 4.1.2.2 Antibiotic
 - 4.1.2.3 Hormonal Agent
 - 4.1.2.4 Combination
 - 4.1.2.5 Others
 - 4.1.3 Segmentation, by mode of administration
 - 4.1.3.1 Topical
 - 4.1.3.2 Oral
 - 4.1.3.3 Injectable

- 4.1.4 Segmentation, by major market
 - 4.1.4.1 U.S.
 - 4.1.4.2 EU5
 - 4.1.4.3 Japan
- 4.1.5 Market size and forecast
- 4.1.6 Sales performance
- 4.1.7 Market dynamics among leading brands
- 4.2 Patent Expiry Schedule
- 4.3 Drivers and Challenges
- 4.4 Deals Landscape (2013-2018)
- 4.5 Pricing and Reimbursement
- 4.6 Emerging Markets
 - 4.6.1 India
 - 4.6.2 South Korea
 - 4.6.3 Brazil
 - 4.6.4 Mexico
- 4.7 SWOT Analysis

CHAPTER 5 ACNE DRUGS MARKET: PIPELINE INTELLIGENCE

- 5.1 Pipeline Landscape
 - 5.1.1 Drugs under Development
- 5.2 Key R&D Trends
 - 5.2.1 Monoclonal Antibodies
 - 5.2.2 Stearoyl-CoA desaturase
 - 5.2.3 Melanocortin Receptor Antagonist
- 5.3 Late-Stage Pipeline
- 5.4 Profile of Disruptive Drugs
 - 5.4.1 Seysara
 - 5.4.2 CJM112
 - 5.4.3 FMX-101
 - 5.4.4 TWIN (S6G5T-1, S6G5T-3)

CHAPTER 6 COMPANY PROFILES

- 6.1 Allergan
 - 6.1.1 Company Overview
 - 6.1.2 Current Product Portfolio
 - 6.1.3 Product Forecast Sales

- 6.1.4 Company - key news flow
- 6.1.5 Pipeline View
- 6.1.6 Pipeline Forecast
- 6.1.7 Catalysts and Event Calendar
- 6.1.8 SWOT Analysis
- 6.2 Bayer
 - 6.2.1 Company Overview
 - 6.2.2 Current Product Portfolio
 - 6.2.3 Product Forecast Sales
 - 6.2.4 Company - key news flow
 - 6.2.5 SWOT Analysis
- 6.3 Galderma S.A.
 - 6.3.1 Company Overview
 - 6.3.2 Current Product Portfolio
 - 6.3.3 Product Forecast Sales
 - 6.3.4 Company - key news flow
 - 6.3.5 Pipeline View
 - 6.3.6 Pipeline Forecast
 - 6.3.7 SWOT Analysis
- 6.4 Stiefel
 - 6.4.1 Company Overview
 - 6.4.2 Current Product Portfolio
 - 6.4.3 Product Forecast Sales
 - 6.4.4 Company - key news flow
 - 6.4.5 SWOT Analysis
- 6.5 Valeant
 - 6.5.1 Company Overview
 - 6.5.2 Current Product Portfolio
 - 6.5.3 Product Forecast Sales
 - 6.5.4 Company - key news flow
 - 6.5.5 Pipeline View
 - 6.5.6 Pipeline Forecast
 - 6.5.7 Catalysts and Event Calendar
 - 6.5.8 SWOT Analysis

CHAPTER 7 MARKET OUTLOOK

- 7.1 Winners and Losers
- 7.2 Emerging Companies

7.3 What the Future Holds

List Of Tables

LIST OF TABLES

Table 1 List of Abbreviation
Table 2 Acne Prevalence and Incidence Rates - 2017 (in %)
Table 3 Forecast Acne Prevalence and Incidence Rates, 2017A - 2025E (in %)
Table 4 Acne Type and Treatment
Table 5 Acne Drugs Market Size and Forecast (in USD Million)
Table 6 Geographic Sales Performance, by Seven Major Markets (in USD Million)
Table 7 Acne Drugs Market, by Type (in USD Million)
Table 8 Acne Drugs Market, by Therapeutic Class (in USD Million)
Table 9 Acne Drugs Market, by Mode of Administration (in USD Million)
Table 10 Acne Drugs - U.S. Patent Expiry Schedule
Table 11 Acne Deals Landscape (2013-2018)
Table 12 Acne Product Pricing
Table 13 Acne Drugs in Development
Table 14 Late-Stage Acne Pipeline
Table 15 Pipeline Forecast - Global Acne Drugs
Table 16 Profile of Disruptive Drug: Seysara
Table 17 Profile of Disruptive Drug: CJM112
Table 18 Profile of Disruptive Drug: FMX-101
Table 19 Profile of Disruptive Drug: TWIN (S6G5T-1, S6G5T-3)
Table 20 Product Portfolio: Allergan
Table 21 Allergan Product Forecast Sales 2017A - 2025E (in USD Million)
Table 22 Allergan Pipeline View
Table 23 Allergan Catalysts and Event Calendar
Table 24 Product Portfolio: Diane-35
Table 25 Diane Product Forecast Sales 2017A - 2025E (in USD Million)
Table 26 Product Portfolio: Galderma
Table 27 Galderma Product Forecast Sales 2017A - 2025E (in USD Million)
Table 28 Galderma Pipeline View
Table 29 Product Portfolio: Stiefel
Table 30 Duac Product Forecast Sales 2017A - 2025E (in USD Million)
Table 31 Product Portfolio: Valeant
Table 32 Valeant Product Forecast Sales 2017A - 2025E (in USD Million)
Table 33 Valeant Pipeline View
Table 34 Valeant Catalysts and Event Calendar

List Of Figures

LIST OF FIGURES

- Fig.1 Acne - Main Causative Factors
- Fig.2 Acne - Degree of Severity
- Fig.3 Current Prevalence Across Seven Major Markets - 2017
- Fig.4 Current Incidence Across Seven Major Markets - 2017
- Fig.5 Market Segmentation and Scope
- Fig.6 Geographic Sales Performance by Seven Major Markets 2017
- Fig.7 Acne Drugs Market, by Type (2017)
- Fig.8 Acne Drugs Market, by Therapeutic Class, 2017A - 2025E (in USD Million)
- Fig.9 Acne Drugs Market Share, by Therapeutic Class (2017)
- Fig.10 Acne Sales Trend, by Mode of Administration 2017 (in USD Million)
- Fig.11 U.S. Acne Drugs Market, by Type (in USD Million)
- Fig.12 U.S. Acne Drugs Market, by Therapeutic Class (in USD Million)
- Fig.13 U.S. Acne Drugs Market, by Mode of Administration (in USD Million)
- Fig.14 U.K. Acne Drugs Market, by Type (in USD Million)
- Fig.15 U.K. Acne Drugs Market, by Therapeutic Class (in USD Million)
- Fig.16 U.K. Acne Drugs Market, by Mode of Administration (in USD Million)
- Fig.17 Germany Acne Drugs Market, by Type (in USD Million)
- Fig.18 Germany Acne Drugs Market, by Therapeutic Class (in USD Million)
- Fig.19 Germany Acne Drugs Market, by Mode of Administration (in USD Million)
- Fig.20 Spain Acne Drugs Market, by Type (in USD Million)
- Fig.21 Spain Acne Drugs Market, by Therapeutic Class (in USD Million)
- Fig.22 Spain Acne Drugs Market, by Mode of Administration (in USD Million)
- Fig.23 France Acne Drugs Market, by Type (in USD Million)
- Fig.24 France Acne Drugs Market, by Therapeutic Class (in USD Million)
- Fig.25 France Acne Drugs Market, by Mode of Administration (in USD Million)
- Fig.26 Italy Acne Drugs Market, by Type (in USD Million)
- Fig.27 Italy Acne Drugs Market, by Therapeutic Class (in USD Million)
- Fig.28 Italy Acne Drugs Market, by Mode of Administration (in USD Million)
- Fig.29 Japan Acne Drugs Market, by Type (in USD Million)
- Fig.30 Japan Acne Drugs Market, by Therapeutic Class (in USD Million)
- Fig.31 Japan Acne Drugs Market, by Mode of Administration (in USD Million)
- Fig.32 Acne Drugs Market Share Distribution, by Company (2017A - 2025E)
- Fig.33 Market Trends & Outlook
- Fig.34 Market Driver Relevance Analysis (Current & Future Impact)
- Fig.35 Market Restraint Relevance Analysis (Current & Future Impact)

Fig.36 SWOT Analysis (Acne Drugs Market)

Fig.37 Pipeline Assets, by Phase

Fig.38 SWOT Analysis (Allergan)

Fig.39 SWOT Analysis (Bayer)

Fig.40 SWOT Analysis (Galderma)

Fig.41 SWOT Analysis (Stiefel)

Fig.42 SWOT Analysis (Valeant)

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