

# The Future of the U.S. Biologics and Biosimilars Treatment Market for Psoriasis

<https://marketpublishers.com/r/F37ECDE89F7EN.html>

Date: October 2017

Pages: 104

Price: US\$ 4,000.00 (Single User License)

ID: F37ECDE89F7EN

## Abstracts

The U.S. psoriasis treatment market for Biologics and Biosimilars was estimated at \$6.6bn in 2016 is projected to almost double during the forecast period to reach \$12.9bn in 2021 driven by safety and efficacy improvements of the new generation biologics.

The psoriasis treatment market is dominated by topical agents and photo therapy for the non-severe forms (mainly corticosteroids), but mild to severe forms are treated with systemic agents. The psoriasis treatment market is dominated by topical agents and photo therapy for the non-severe forms (mainly corticosteroids), but mild to severe forms are treated with systemic agents.

Driven by improved efficacy, the first group of anti TNF treatments led by Enbrel, Humira and Remicade made strong penetration into the psoriasis market. However the emergence of the IL-17 inhibitor class driven by Novartis' Cosentyx and Eli Lilly's Talz have set a new benchmark for efficacy in moderate to severe psoriasis treatment with potential for safety improvement in comparison to the anti TNF drugs given their greater specificity in immune Suppression. MP Advisors expect the TNF class of drugs to lose share to the newer brands with improved clinical profiles in Psoriasis.

The market growth in psoriasis is driven by an upsurge in demand from new therapies in moderate to severe patient population which overshadows reduced pricing of branded TNF- $\alpha$  inhibitor and recent biosimilar launches. The psoriasis treatment market is facing increasing competitive pressure from a wave of biosimilar launches such as biosimilars of Janssen's Remicade, and Amgen's Enbrel with the impact of the headwinds expected to be more pronounced in the next few years.

Stelara has been an important growth driver of Janssen's immunology franchise in recent years, with overall global sales doubling from \$1.5bn in 2013 to more than \$3.2bn in 2016. However Stelara has started to face steeper competition from the IL-17 drug class. A new head-to-head study report IL-17 products to demonstrate superior efficacy to Stelara for psoriasis.

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