

IL-17A Inhibitor Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application

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Abstracts

IL-17A Inhibitor Market Summary

The IL-17A inhibitor market emerges as a transformative force in immunology therapeutics, zeroing in on cytokines pivotal to Th17-mediated inflammation in autoimmune dermatologic and rheumatologic conditions. IL-17A, a pro-inflammatory mediator, fuels neutrophil recruitment and keratinocyte hyperproliferation, underpinning diseases like plaque psoriasis affecting 125 million globally and psoriatic arthritis in 30% of those cases. Market hallmarks encompass fully humanized monoclonals blocking IL-17A homodimers or heterodimers, delivered subcutaneously every four weeks, yielding PASI 90 responses in 70-80% of moderate-to-severe psoriasis patients within 12 weeks, surpassing older TNF inhibitors in skin clearance while preserving joint efficacy. This class's specificity curtails infections compared to broad immunosuppressants, though candida risks necessitate monitoring, with innovation pivoting to bispecific designs targeting IL-17A/F for ankylosing spondylitis synergies and oral small-molecule entrants disrupting ROR γ t transcription. The landscape integrates dermatology-rheumatology collaborations for holistic management, biomarker-driven dosing via DLQI scores, and patient-reported outcomes emphasizing psychosocial benefits from visible improvements. Challenges include uveitis flares in 5-10% of users and the need for washout periods pre-conception, yet orphan incentives spur pipeline diversity in hidradenitis suppurativa. By 2025, the global IL-17A inhibitor market is estimated to be valued between USD 10 billion and USD 15 billion, with a projected compound annual growth rate (CAGR) of 6.5% to 9.5% through 2030. This accelerated pace mirrors label broadenings into non-radiographic axial spondyloarthritis, rising biosimilar threats post-patent expiry, and emerging market adoptions fueled by telemedicine for remote monitoring, balanced by competitive intensification from IL-23

alternatives.

Regional Market Trends

IL-17A inhibitor market evolutions differ regionally, shaped by disease epidemiology, dermatology infrastructure, and formulary preferences.

North America: Boasting a CAGR of 6.0%–9.0%, the United States spearheads via high psoriasis prevalence in Caucasian populations and step-therapy waivers for rapid initiations, with trends toward value-based bundles in California hubs.

Europe: Growing at a CAGR of 5.5%–8.5%, Germany and France dominate through HTA assessments favoring rapid PASI improvements, emphasizing joint-skin dual outcomes in centralized registries.

Asia-Pacific: Projected CAGR of 7.0%–10.0%, India and Japan fuel ascent amid genetic predispositions in South Asians, with national programs subsidizing fixed-dose pens for urban clinics.

Latin America: At a CAGR of 6.5%–9.5%, Brazil and Argentina progress via PAHO-endorsed guidelines for psoriatic arthritis, targeting affordable access in underserved Amazonian communities.

Middle East and Africa (MEA): Exhibiting a CAGR of 6.0%–9.0%, UAE leads with expatriate-driven demand and Gulf-funded biologics centers, countering African underdiagnosis through mobile screening vans.

Application Analysis

The IL-17A inhibitor market segments by application, harnessing anti-inflammatory potency across dermatologic and musculoskeletal domains with trajectories toward multifunctionality.

Psoriasis: This core application leverages IL-17A blockade for plaque clearance, achieving 90% BSA reductions in biologics-naïve patients; trends encompass head/neck involvement approvals and phototherapy adjuncts for recalcitrant palmoplantar subtypes.

Psoriatic arthritis: Addressing enthesitis and dactylitis in 20-30% of psoriasis cases, inhibitors like secukinumab yield ACR50 responses in 60%, with evolutions toward ultrasound-guided early interventions minimizing radiographic progression.

Ankylosing spondylitis: For HLA-B27-positive axial disease, IL-17A agents reduce BASDAI scores by 50%, trending to non-radiographic extensions and MRI endpoints validating spinal inflammation halts.

Others: Spanning hidradenitis suppurativa and Crohn's, this arena trends to dose escalations and bispecifics targeting IL-17F for enhanced gut-skin axis control in comorbidities.

Company Profiles

Novartis: Novartis's Cosentyx (secukinumab) led with USD 6-6.5 billion in 2024 revenues, up 23% to \$6.141 billion, powering immunology growth within total 2024 net sales expansions; U.S. and European patents expire in 2029-2030, spurring biosimilar preparations.

Eli Lilly: Eli Lilly's Taltz (ixekizumab) generated USD 3-3.5 billion in 2024 sales, with Q4 alone at \$952 million up 21%, contributing to immunology totals amid patents lapsing 2028-2031; U.S. trends showed 24% revenue hikes to \$665.5 million in Q4.

UCB: UCB's BIMZELX (bimekizumab-bkzx) achieved USD 0.6-0.7 billion in 2024 revenues, bolstering €5.613 billion net sales up 17% CER, with FDA 320 mg psoriasis approvals in October 2024 enhancing moderate-to-severe positioning.

Ortho Dermatologics: Ortho Dermatologics' SILIQ (brodalumab) sustains niche psoriasis revenues, integrated into Bausch Health's dermatology segment reporting \$634 million in Q4 2024, focusing on IL-17RA blockade for recalcitrant plaques.

Industry Value Chain Analysis

The IL-17A inhibitor value chain fuses genomic insights with targeted cytokine neutralization, illustrative of dermatology-rheumatology convergence and patient empowerment. It launches with R&D, employing single-cell RNA sequencing to dissect Th17 polarization and imiquimod-induced psoriasis models for potency assays, advancing via Phase III superiority trials against TNFs using composite ACR/PASI endpoints and EMA PRIME access for expedited filings. Manufacturing utilizes PER.C6 or NS0 cells for glycosylated monoclonals, with affinity chromatography yielding >99% purity and endotoxin controls below 0.5 EU/mg, scaled via single-use bioreactors to mitigate contamination risks. Supply ecosystems feature temperature-monitored logistics for 2-8°C vials, with RFID tracking per GS1 standards to ensure 98% on-time delivery amid seasonal demand. Regulatory milestones include FDA dermatology division reviews on scalp/nail subscales and post-marketing studies via PSOLAR-like registries surveilling malignancies. Marketing harnesses virtual reality simulations of skin clearance for HCP education, disseminated through specialty distributors with rebate cards slashing copays to \$5. End-delivery incorporates app-based injection trackers and multidisciplinary clinics blending telederm with physiatry, promoting adherence via nudges. Novartis exemplifies end-to-end control from secukinumab discovery to global tenders, while UCB's BIMZELX leverages partnerships for IL-17A/F dual inhibition, navigating \$1.5-2.5 billion R&D investments and HTA dossiers quantifying QALY gains at 0.8-1.2 per patient-year.

Opportunities and Challenges

Opportunities:

Indication Diversification: Axial spondyloarthritis non-radiographic approvals could swell eligible pools by 25%, especially in Asia-Pacific, via MRI-integrated trials demonstrating ASDAS improvements.

Bispecific Advancements: Dual IL-17A/F blockers like bimekizumab promise 10-15% superior joint responses, capturing premium segments in psoriatic arthritis through head-to-head data.

Biosimilar Horizons: Post-2028 expiries enable 30-40% price drops in Europe, spurring Latin American tenders and volume surges in high-prevalence MEA cohorts.

Digital Personalization: Wearable inflammation trackers linked to dosing apps

could boost persistence to 90%, facilitating real-world evidence for payer buy-in.

Challenges:

Patent Cliffs: 2029-2031 expiries for Cosentyx and Taltz risk 50% revenue erosion, intensifying biosimilar litigation and forcing lifecycle extensions via formulations.

Safety Profiles: Candida incidences at 3-5% deter initiations in immunocompromised, requiring enhanced prophylaxis guidelines and pharmacovigilance to sustain trust.

Access Inequities: Dermatology wait times averaging 4-6 months in rural North America delay therapies, exacerbating DLQI burdens in underserved Hispanic populations.

Competitive Overlap: IL-23 rivals like guselkumab siphon 20% market share in psoriasis, demanding differentiated combo studies to reclaim frontline status.

Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

3.1 Research Scope

3.2 Research Sources

3.2.1 Data Sources

3.2.2 Assumptions

3.3 Research Method

Chapter Four Market Landscape

4.1 Market Overview

4.2 Classification/Types

4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

5.1 Introduction

5.2 Drivers

5.3 Restraints

5.4 Opportunities

5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

6.1 Upstream/Suppliers Analysis

6.2 IL?17A Inhibitor Analysis

6.2.1 Technology Analysis

6.2.2 Cost Analysis

6.2.3 Market Channel Analysis

6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

7.1 Latest News

7.2 Merger and Acquisition

- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

CHAPTER 8 HISTORICAL AND FORECAST IL?17A INHIBITOR MARKET IN NORTH AMERICA (2020-2030)

- 8.1 IL?17A Inhibitor Market Size
- 8.2 IL?17A Inhibitor Market by End Use
- 8.3 Competition by Players/Suppliers
- 8.4 IL?17A Inhibitor Market Size by Type
- 8.5 Key Countries Analysis
 - 8.5.1 United States
 - 8.5.2 Canada

CHAPTER 9 HISTORICAL AND FORECAST IL?17A INHIBITOR MARKET IN SOUTH AMERICA (2020-2030)

- 9.1 IL?17A Inhibitor Market Size
- 9.2 IL?17A Inhibitor Market by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 IL?17A Inhibitor Market Size by Type
- 9.5 Key Countries Analysis

CHAPTER 10 HISTORICAL AND FORECAST IL?17A INHIBITOR MARKET IN ASIA & PACIFIC (2020-2030)

- 10.1 IL?17A Inhibitor Market Size
- 10.2 IL?17A Inhibitor Market by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 IL?17A Inhibitor Market Size by Type
- 10.5 Key Countries Analysis
 - 10.5.1 China
 - 10.5.2 India
 - 10.5.3 Japan
 - 10.5.4 South Korea
 - 10.5.5 Southeast Asia
 - 10.5.6 Australia

CHAPTER 11 HISTORICAL AND FORECAST IL?17A INHIBITOR MARKET IN

EUROPE (2020-2030)

- 11.1 IL?17A Inhibitor Market Size
- 11.2 IL?17A Inhibitor Market by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 IL?17A Inhibitor Market Size by Type
- 11.5 Key Countries Analysis
 - 11.5.1 Germany
 - 11.5.2 France
 - 11.5.3 United Kingdom
 - 11.5.4 Italy
 - 11.5.5 Spain
 - 11.5.6 Belgium
 - 11.5.7 Netherlands
 - 11.5.8 Austria
 - 11.5.9 Poland
 - 11.5.10 Russia

CHAPTER 12 HISTORICAL AND FORECAST IL?17A INHIBITOR MARKET IN MEA (2020-2030)

- 12.1 IL?17A Inhibitor Market Size
- 12.2 IL?17A Inhibitor Market by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 IL?17A Inhibitor Market Size by Type
- 12.5 Key Countries Analysis

CHAPTER 13 SUMMARY FOR GLOBAL IL?17A INHIBITOR MARKET (2020-2025)

- 13.1 IL?17A Inhibitor Market Size
- 13.2 IL?17A Inhibitor Market by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 IL?17A Inhibitor Market Size by Type

CHAPTER 14 GLOBAL IL?17A INHIBITOR MARKET FORECAST (2025-2030)

- 14.1 IL?17A Inhibitor Market Size Forecast
- 14.2 IL?17A Inhibitor Application Forecast
- 14.3 Competition by Players/Suppliers

14.4 IL?17A Inhibitor Type Forecast

CHAPTER 15 ANALYSIS OF GLOBAL KEY VENDORS

15.1 Novartis

15.1.1 Company Profile

15.1.2 Main Business and IL?17A Inhibitor Information

15.1.3 SWOT Analysis of Novartis

15.1.4 Novartis IL?17A Inhibitor Revenue, Gross Margin and Market Share (2020-2025)

15.2 Eli Lilly

15.2.1 Company Profile

15.2.2 Main Business and IL?17A Inhibitor Information

15.2.3 SWOT Analysis of Eli Lilly

15.2.4 Eli Lilly IL?17A Inhibitor Revenue, Gross Margin and Market Share (2020-2025)

15.3 UCB

15.3.1 Company Profile

15.3.2 Main Business and IL?17A Inhibitor Information

15.3.3 SWOT Analysis of UCB

15.3.4 UCB IL?17A Inhibitor Revenue, Gross Margin and Market Share (2020-2025)

15.4 Ortho Dermatologics

15.4.1 Company Profile

15.4.2 Main Business and IL?17A Inhibitor Information

15.4.3 SWOT Analysis of Ortho Dermatologics

15.4.4 Ortho Dermatologics IL?17A Inhibitor Revenue, Gross Margin and Market Share (2020-2025)

Please ask for sample pages for full companies list

Tables & Figures

TABLES AND FIGURES

Table Abbreviation and Acronyms

Table Research Scope of IL?17A Inhibitor Report

Table Data Sources of IL?17A Inhibitor Report

Table Major Assumptions of IL?17A Inhibitor Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure IL?17A Inhibitor Picture

Table IL?17A Inhibitor Classification

Table IL?17A Inhibitor Applications

Table Drivers of IL?17A Inhibitor Market

Table Restraints of IL?17A Inhibitor Market

Table Opportunities of IL?17A Inhibitor Market

Table Threats of IL?17A Inhibitor Market

Table COVID-19 Impact for IL?17A Inhibitor Market

Table Raw Materials Suppliers

Table Different Production Methods of IL?17A Inhibitor

Table Cost Structure Analysis of IL?17A Inhibitor

Table Key End Users

Table Latest News of IL?17A Inhibitor Market

Table Merger and Acquisition

Table Planned/Future Project of IL?17A Inhibitor Market

Table Policy of IL?17A Inhibitor Market

Table 2020-2030 North America IL?17A Inhibitor Market Size

Figure 2020-2030 North America IL?17A Inhibitor Market Size and CAGR

Table 2020-2030 North America IL?17A Inhibitor Market Size by Application

Table 2020-2025 North America IL?17A Inhibitor Key Players Revenue

Table 2020-2025 North America IL?17A Inhibitor Key Players Market Share

Table 2020-2030 North America IL?17A Inhibitor Market Size by Type

Table 2020-2030 United States IL?17A Inhibitor Market Size

Table 2020-2030 Canada IL?17A Inhibitor Market Size

Table 2020-2030 South America IL?17A Inhibitor Market Size

Figure 2020-2030 South America IL?17A Inhibitor Market Size and CAGR

Table 2020-2030 South America IL?17A Inhibitor Market Size by Application

Table 2020-2025 South America IL?17A Inhibitor Key Players Revenue

Table 2020-2025 South America IL?17A Inhibitor Key Players Market Share

Table 2020-2030 South America IL?17A Inhibitor Market Size by Type
Table 2020-2030 Asia & Pacific IL?17A Inhibitor Market Size
Figure 2020-2030 Asia & Pacific IL?17A Inhibitor Market Size and CAGR
Table 2020-2030 Asia & Pacific IL?17A Inhibitor Market Size by Application
Table 2020-2025 Asia & Pacific IL?17A Inhibitor Key Players Revenue
Table 2020-2025 Asia & Pacific IL?17A Inhibitor Key Players Market Share
Table 2020-2030 Asia & Pacific IL?17A Inhibitor Market Size by Type
Table 2020-2030 China IL?17A Inhibitor Market Size
Table 2020-2030 India IL?17A Inhibitor Market Size
Table 2020-2030 Japan IL?17A Inhibitor Market Size
Table 2020-2030 South Korea IL?17A Inhibitor Market Size
Table 2020-2030 Southeast Asia IL?17A Inhibitor Market Size
Table 2020-2030 Australia IL?17A Inhibitor Market Size
Table 2020-2030 Europe IL?17A Inhibitor Market Size
Figure 2020-2030 Europe IL?17A Inhibitor Market Size and CAGR
Table 2020-2030 Europe IL?17A Inhibitor Market Size by Application
Table 2020-2025 Europe IL?17A Inhibitor Key Players Revenue
Table 2020-2025 Europe IL?17A Inhibitor Key Players Market Share
Table 2020-2030 Europe IL?17A Inhibitor Market Size by Type
Table 2020-2030 Germany IL?17A Inhibitor Market Size
Table 2020-2030 France IL?17A Inhibitor Market Size
Table 2020-2030 United Kingdom IL?17A Inhibitor Market Size
Table 2020-2030 Italy IL?17A Inhibitor Market Size
Table 2020-2030 Spain IL?17A Inhibitor Market Size
Table 2020-2030 Belgium IL?17A Inhibitor Market Size
Table 2020-2030 Netherlands IL?17A Inhibitor Market Size
Table 2020-2030 Austria IL?17A Inhibitor Market Size
Table 2020-2030 Poland IL?17A Inhibitor Market Size
Table 2020-2030 Russia IL?17A Inhibitor Market Size
Table 2020-2030 MEA IL?17A Inhibitor Market Size
Figure 2020-2030 MEA IL?17A Inhibitor Market Size and CAGR
Table 2020-2030 MEA IL?17A Inhibitor Market Size by Application
Table 2020-2025 MEA IL?17A Inhibitor Key Players Revenue
Table 2020-2025 MEA IL?17A Inhibitor Key Players Market Share
Table 2020-2030 MEA IL?17A Inhibitor Market Size by Type
Table 2020-2025 Global IL?17A Inhibitor Market Size by Region
Table 2020-2025 Global IL?17A Inhibitor Market Size Share by Region
Table 2020-2025 Global IL?17A Inhibitor Market Size by Application
Table 2020-2025 Global IL?17A Inhibitor Market Share by Application

Table 2020-2025 Global IL?17A Inhibitor Key Vendors Revenue
Figure 2020-2025 Global IL?17A Inhibitor Market Size and Growth Rate
Table 2020-2025 Global IL?17A Inhibitor Key Vendors Market Share
Table 2020-2025 Global IL?17A Inhibitor Market Size by Type
Table 2020-2025 Global IL?17A Inhibitor Market Share by Type
Table 2025-2030 Global IL?17A Inhibitor Market Size by Region
Table 2025-2030 Global IL?17A Inhibitor Market Size Share by Region
Table 2025-2030 Global IL?17A Inhibitor Market Size by Application
Table 2025-2030 Global IL?17A Inhibitor Market Share by Application
Table 2025-2030 Global IL?17A Inhibitor Key Vendors Revenue
Figure 2025-2030 Global IL?17A Inhibitor Market Size and Growth Rate
Table 2025-2030 Global IL?17A Inhibitor Key Vendors Market Share
Table 2025-2030 Global IL?17A Inhibitor Market Size by Type
Table 2025-2030 IL?17A Inhibitor Global Market Share by Type
Table Novartis Information
Table SWOT Analysis of Novartis
Table 2020-2025 Novartis IL?17A Inhibitor Revenue Gross Profit Margin
Figure 2020-2025 Novartis IL?17A Inhibitor Revenue and Growth Rate
Figure 2020-2025 Novartis IL?17A Inhibitor Market Share
Table Eli Lilly Information
Table SWOT Analysis of Eli Lilly
Table 2020-2025 Eli Lilly IL?17A Inhibitor Revenue Gross Profit Margin
Figure 2020-2025 Eli Lilly IL?17A Inhibitor Revenue and Growth Rate
Figure 2020-2025 Eli Lilly IL?17A Inhibitor Market Share
Table UCB Information
Table SWOT Analysis of UCB
Table 2020-2025 UCB IL?17A Inhibitor Revenue Gross Profit Margin
Figure 2020-2025 UCB IL?17A Inhibitor Revenue and Growth Rate
Figure 2020-2025 UCB IL?17A Inhibitor Market Share
Table Ortho Dermatologics Information
Table SWOT Analysis of Ortho Dermatologics
Table 2020-2025 Ortho Dermatologics IL?17A Inhibitor Revenue Gross Profit Margin
Figure 2020-2025 Ortho Dermatologics IL?17A Inhibitor Revenue and Growth Rate
Figure 2020-2025 Ortho Dermatologics IL?17A Inhibitor Market Share
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