




HEALTHCARE

The Autoimmune Outlook to 2013

Competitive landscape, pipeline analysis and growth opportunities

Business Insights

 [Table of Contents](#)

About Business Insights

Business Insights has a small team of life sciences analysts based in Europe and India. Drawn from consulting and industry backgrounds, the team has significant experience of research, analysis and forecasting of the pharmaceutical and biotech sectors. Our analysts liaise on a regular basis with external experts and have access to a wide range of proprietary and third party databases, giving them a unique insight on the future trends in therapy areas and pharmaceutical strategy.

Copyright © 2009 Business Insights Ltd
This Management Report is published by Business Insights Ltd. All rights reserved.
Reproduction or redistribution of this Management Report in any form for any purpose is expressly prohibited without the prior consent of Business Insights Ltd.

The views expressed in this Management Report are those of the publisher, not of Business Insights. Business Insights Ltd accepts no liability for the accuracy or completeness of the information, advice or comment contained in this Management Report nor for any actions taken in reliance thereon.

While information, advice or comment is believed to be correct at the time of publication, no responsibility can be accepted by Business Insights Ltd for its completeness or accuracy.

Table of Contents

The Autoimmune Market Outlook to 2013

Executive Summary	12	
Epidemiology of autoimmune diseases	12	
Global market analysis	13	
Pipeline analysis	14	
Competitive landscape	15	
Chapter 1	Scope and methodology	18
Scope		18
Key autoimmune indications covered in this report:		18
Methodology		19
Chapter 2	Epidemiology of autoimmune diseases	22
Summary		22
Introduction		23
Osteoarthritis		24
Overview		24
Diagnosis, treatment and management		24
Epidemiology		26
Forecast epidemiology		27
Rheumatoid arthritis		28
Overview		28
Diagnosis, treatment and management		28
Epidemiology		29
Forecast epidemiology		30
Crohn's disease		31
Overview		31
Diagnosis, treatment and management		31
Epidemiology		33

Forecast epidemiology	34
Systemic lupus erythematosus	35
Overview	35
Diagnosis, treatment and management	36
Epidemiology	38
Forecast epidemiology	39
Ulcerative colitis	40
Overview	40
Diagnosis, treatment and management	41
Epidemiology	42
Forecast epidemiology	43
Multiple sclerosis	44
Overview	44
Diagnosis, treatment and management	45
Epidemiology	46
Forecast epidemiology	47

Chapter 3 Global market analysis 50

Summary	50
Introduction	51
Market analysis by country	51
Trends in generics usage and licensing	53
Market analysis by drug class	54
Leading brands dynamics	56
Key events in the autoimmune market	57
Enbrel growth slowing as it faces stiff competition from Humira	57
RoActemra receives positive opinion in Europe for the treatment of RA	58
NICE admits previous guidance around sequential use of anti-TNF therapies in RA is unfair	58
Study shows prohibitive cost of MS treatment	59
Mayo Clinic collaborates to advance Crohn's treatment	59
Arthritis research shows better disease management is more important than the use of drugs	60
CellCept's off-label use in lupus continues to increase	60
Immunosuppressants	60
Competitive dynamics of immunosuppressants	60
Leading brands of immunosuppressants	61
Key brands analysis	62
Clinical developments	63
Immunosuppressants sales forecasts to 2013	69
Specific anti-rheumatic agents	70
Competitive dynamics of specific anti-rheumatic agents	70

Leading brands of specific anti-rheumatic agents	71
Key brands analysis	72
Specific anti-rheumatic agents sales forecasts to 2013	81
Non-steroidal plain anti-rheumatics	82
Competitive dynamics of non-steroidal plain anti-rheumatics	82
Leading brands of non-steroidal plain anti-rheumatics	83
Key brands analysis	84
Non-steroidal plain anti-rheumatics sales forecasts to 2013	88
Topical anti-rheumatics	89
Competitive dynamics of topical anti-rheumatics	89
Leading brands of topical anti-rheumatics	90
Topical anti-rheumatic sales forecasts to 2013	92
Coxibs	93
Competitive dynamics of coxibs	93
Leading brands of coxibs	94
Key brands analysis	95
Coxibs sales forecasts to 2013	100
Non-steroidal (combinational) anti-rheumatics	101
Competitive dynamics of non-steroidal (combinational) anti-rheumatics	101
Leading brands of non-steroidal (combinational) anti-rheumatics	102
Non-steroidal (combinational) anti-rheumatics sales forecasts to 2013	103
Anti-rheumatic corticosteroids	104
Competitive dynamics of anti-rheumatic corticosteroids	104
Leading brands of anti-rheumatic corticosteroids	105
Anti-rheumatic corticosteroids sales forecasts to 2013	107
Total autoimmune sales forecasts to 2013	108

Chapter 4 Pipeline analysis 112

Summary	112
Introduction	113
Key trends in R&D	113
Biologics	114
Combination drugs	114
Aggressive medical therapy becoming the standard of care	115
TNF inhibitors has a strong presence in autoimmune market	115
Efforts to develop fully human monoclonal antibodies	115
The autoimmune pipeline	116
Leading drugs in development	119
Profiles of key pipeline products	120
Phase III compounds	120
Licofelone (ML3000) – Merckle GmbH	120
Ocrelizumab (R-1594) – Genentech, Biogen IDEC, Chugai and Roche	123

LymphoStat-B (belimumab) – Human Genome Sciences (HGS) and GSK	125
Ofatumumab (HuMax-CD20) – Genmab and GSK	127
Fingolimod (FTY-720) – Novartis/Mitsubishi Tanabe Pharma	130
Fampridine-SR – Acorda	133
Campath (alemtuzumab) – Genzyme and Bayer Schering Pharma	136
Recently approved/marketed drugs	139
Cimzia (certolizumab pegol) – UCB	139
Golimumab (CNTO-148) – Centocor/Schering-Plough	143
Actemra (tocilizumab) – Roche/Chugai	146
Tysabri (natalizumab) – Elan/Biogen Idec	149
Mesavance (mesalamine) – Shire	152
Pipeline forecasts	155
Factors affecting forecasts	155
Autoimmune pipeline forecast	155

Chapter 5 Competitive landscape 158

Summary	158
Introduction	159
Sales performance of leading players	159
Detailed analysis of leading autoimmune players	162
Amgen	162
Overview	162
Sales focus by drug class	162
Marketed product portfolio	163
R&D pipeline analysis	164
Strategic and growth analysis	165
<i>Drivers of growth</i>	165
<i>Resistors of growth</i>	166
Abbott	166
Overview	166
Sales focus by drug class	167
Marketed product portfolio	168
R&D pipeline analysis	169
Strategic and growth analysis	170
<i>Drivers of growth</i>	170
<i>Resistors of growth</i>	170
Johnson and Johnson	171
Overview	171
Sales focus by drug class	171
Marketed product portfolio	172
R&D pipeline analysis	173
Strategic and growth analysis	174
<i>Drivers of growth</i>	174
<i>Resistors of growth</i>	174

Pfizer	175
Overview	175
Sales focus by drug class	175
Marketed product portfolio	176
R&D pipeline analysis	177
Strategic and growth analysis	178
<i>Drivers of growth</i>	178
<i>Resistors of growth</i>	178
Novartis	179
Overview	179
Sales focus by drug class	179
Marketed product portfolio	180
R&D pipeline analysis	181
Strategic and growth analysis	182
<i>Drivers of growth</i>	182
<i>Resistors of growth</i>	183
Wyeth	183
Overview	183
Wyeth and Pfizer	184
Sales focus by drug class	184
Marketed product portfolio	185
R&D pipeline analysis	187
Strategic and growth analysis	188
<i>Drivers of growth</i>	188
<i>Resistors of growth</i>	188
Roche	190
Overview	190
Sales focus by drug class	190
Marketed product portfolio	191
R&D pipeline analysis	192
Strategic and growth analysis	193
<i>Drivers of growth</i>	193
<i>Resistors of growth</i>	193
Astellas	195
Overview	195
Sales focus by drug class	195
Marketed product portfolio	196
R&D pipeline analysis	197
Strategic and growth analysis	198
<i>Drivers of growth</i>	198
<i>Resistors of growth</i>	198

Chapter 6 Appendix 202

IMS Data	202
Immunosuppressive agents	202
L4A: Immunosuppressive agents	202
Musculo-skeletal system	202

M1: Anti-inflammatory and anti-rheumatic products	202
M2: Topical anti-rheumatics	202
Licensing status as per IMS Health	202
Original brand	202
Other brand	203
Licensed brand	203
Not-coded product	203
Unbranded/ generic product	203
Glossary	204
Index	206

List of Figures

Figure 3.1:	Worldwide autoimmune market share by geography, 2007	52
Figure 3.2:	Sales of types of autoimmune brands, 2007	54
Figure 4.3:	Prevailing treatment approach for arthritis (OA and RA)	113
Figure 4.4:	The autoimmune pipeline by indication and stage of development, 2007	116
Figure 4.5:	Leading recently launched products and late-stage R&D in the autoimmune disorders market, 2008	119
Figure 5.6:	Competitive dynamics of the leading players in the global autoimmune market, 2007	161
Figure 5.7:	Amgen's autoimmune sales by drug class, 2007	162
Figure 5.8:	Abbott's autoimmune sales by drug class, 2007	167
Figure 5.9:	J&J's autoimmune sales by drug class, 2007	171
Figure 5.10:	Pfizer's autoimmune sales by drug class, 2007	175
Figure 5.11:	Novartis' autoimmune sales by drug class, 2007	179
Figure 5.12:	Wyeth's autoimmune sales by drug class, 2007	184
Figure 5.13:	Roche's autoimmune sales by drug class, 2007	190
Figure 5.14:	Astellas autoimmune sales by drug class, 2007	195

List of Tables

Table 2.1:	Estimated prevalence of autoimmune diseases across seven major markets, 2007	23
Table 2.2:	Estimated prevalence of OA across seven major markets, 2007	26
Table 2.3:	Forecast epidemiology of OA across seven major markets, 2007–13	27
Table 2.4:	Estimated prevalence of RA across seven major markets, 2007	29
Table 2.5:	Forecast epidemiology of RA across seven major markets, 2007–13	30
Table 2.6:	Estimated prevalence of CD across seven major markets, 2007	33
Table 2.7:	Forecast epidemiology of CD across seven major markets, 2007–13	34
Table 2.8:	Estimated prevalence of lupus across seven major markets, 2007	38
Table 2.9:	Forecast epidemiology of lupus across seven major markets, 2007–13	39
Table 2.10:	Estimated prevalence of UC across seven major markets, 2007	42
Table 2.11:	Forecast epidemiology of UC across seven major markets, 2007–13	43
Table 2.12:	Estimated prevalence of MS across seven major markets, 2007	46
Table 2.13:	Forecast epidemiology of MS across seven major markets, 2007–13	47
Table 3.14:	Worldwide autoimmune sales by countries, 2007	53
Table 3.15:	Breakdown of the global autoimmune market by drug class, 2007	54
Table 3.16:	Leading brands in the global autoimmune market, 2007	56
Table 3.17:	Leading immunosuppressant brands in the global autoimmune market, 2006–07	61
Table 3.18:	Remicade launch status in major markets	63
Table 3.19:	Immunosuppressants sales forecast, 2007–13	69
Table 3.20:	Leading specific anti-rheumatic brands in the global autoimmune market, 2006–07	71
Table 3.21:	Enbrel launch status in major markets	73
Table 3.22:	Specific anti-rheumatic agents sales forecast, 2007–13	81

Table 3.23:	Leading non-steroidal plain anti-rheumatic brands in the global autoimmune market, 2006–07	83
Table 3.24:	Non-steroidal plain anti-rheumatics sales forecast, 2007–13	88
Table 3.25:	Leading topical anti-rheumatic brands in the global autoimmune market, 2006–07	90
Table 3.26:	Topical anti-rheumatic sales forecast, 2007–13	92
Table 3.27:	Leading coxib brands in the global autoimmune market, 2006–07	94
Table 3.28:	Coxibs sales forecast, 2007–13	100
Table 3.29:	Leading non-steroidal (combinational) anti-rheumatic brands in the global autoimmune market, 2006–07	102
Table 3.30:	Non-steroidal (combinational) anti-rheumatics sales forecast, 2007–13	103
Table 3.31:	Leading anti-rheumatic corticosteroid brands in the global autoimmune market, 2006–07	105
Table 3.32:	Anti-rheumatic corticosteroids sales forecast, 2007–13	107
Table 3.33:	Therapeutic sales forecasts by drug class, 2007–13	108
Table 4.34:	An overview of Licofelone	120
Table 4.35:	An overview of Ocrelizumab	123
Table 4.36:	An overview of LymphoStat-B	125
Table 4.37:	An overview of Ofatumumab	127
Table 4.38:	An overview of FTY-720	130
Table 4.39:	An overview of Fampridine-SR	133
Table 4.40:	Fampridine-SR Phase III data	134
Table 4.41:	An overview of Campath	136
Table 4.42:	An overview of Cimzia	139
Table 4.43:	An overview of Golimumab	143
Table 4.44:	An overview of Actemra	146
Table 4.45:	An overview of Tysabri	149
Table 4.46:	An overview of Mesavance	152
Table 4.47:	Autoimmune pipeline sales forecasts, 2007–13	156
Table 5.48:	Leading players in the global autoimmune market, 2007–13 (\$m)	159
Table 5.49:	Amgen’s autoimmune product portfolio, 2006–07	163
Table 5.50:	Amgen’s autoimmune R&D product pipeline, 2008	164
Table 5.51:	Abbott’s autoimmune product portfolio, 2006–07	168
Table 5.52:	Abbott’s autoimmune R&D product pipeline, 2008	169
Table 5.53:	J&J’s autoimmune product portfolio, 2006–07	172
Table 5.54:	J&J’s autoimmune R&D product pipeline, 2008	173
Table 5.55:	Pfizer’s autoimmune product portfolio, 2006–07	176
Table 5.56:	Pfizer’s autoimmune R&D product pipeline, 2008	177
Table 5.57:	Novartis’ autoimmune product portfolio, 2006–07	180
Table 5.58:	Novartis’ autoimmune R&D product pipeline, 2008	181
Table 5.59:	Wyeth’s autoimmune product portfolio, 2006–07	185
Table 5.60:	Wyeth’s autoimmune R&D product pipeline, 2008	187
Table 5.61:	Roche’s autoimmune product portfolio, 2006–07	191
Table 5.62:	Roche’s autoimmune R&D product pipeline, 2008	192
Table 5.63:	Astellas’s autoimmune product portfolio, 2006–07	196
Table 5.64:	Astellas’s autoimmune R&D product pipeline, 2008	197