

GlobalData: Crohn's Disease - Drug Pipeline Analysis and Market Forecasts to 2015 on reports-research.com

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Strategic Competitor Assessment of the Major Marketed Products in Crohn's Disease, 2008

	Entocort EC	Humira	Tysabri	Remicade	Cimzia	Generics
Number of Competitors in the Market	5 Branded + Older Generics					
Efficacy	Medium	High	High	High	High	Low
Safety Profile	Medium	Low	Low	Low	Low	Medium
Patient Satisfaction	Medium	Medium	Low	Medium	Medium	Low
Physician Satisfaction	Medium	Medium	Low	Medium	Medium	Low
Pricing	\$1.50/box	\$1,715/box (two injections)	\$1,430 (15 ml vial)*	\$275/vial	\$330/ampule	\$7.00/vial
Competitive Strength	Medium	Strong	Medium	Strong	Strong	Weak

Current competition in the Crohn's disease market is strong.

Source: GlobalData
*Source: Danish Medicines Agency
Note: Apart from the five branded drugs listed above, Abatacept is used off-label for Crohn's disease (not included in the table).

GlobalData, the industry analysis specialist's new report, Crohn's Disease – Drug Pipeline Analysis and Market Forecasts to 2015 is an essential source of information and analysis on the global Crohn's disease market. The report identifies the key trends shaping and driving the market, and provides insight on the prevalent competitive landscape and the emerging players expected to bring a significant shift in the market positioning of the existing market leaders. Most importantly, the report provides valuable insight on the pipeline products within the global Crohn's disease sector.

The Crohn's Disease Market is Forecast to Show Modest Growth until 2015

GlobalData has estimated the global Crohn's disease market to be valued at \$1.4 billion in 2008. It is expected to grow to \$2.1 billion with a Compound Annual Growth Rate (CAGR) of 5.5% by 2015. This growth is primarily attributed to the increased competition among the existing products and also the strong pipeline with more emerging therapies. The growth will be further supported by the increased uptake of biologics.

Competition in Crohn's Disease Market Becoming More Intense

GlobalData analyzed that the current competition in the Crohn's disease market is becoming more intense due to the increased entry of biologics. Compared to other autoimmune disease markets, this market has witnessed the increased entry of biologics. Though only a small segmentation of people can use biologics, their launch has increased the competition in the Crohn's disease market. Johnson & Johnson's Remicade is the market leader and is followed by Astrazeneca/Promethus's Entocort EC, Biogen Idec's Tysabri and Abbott's Humira respectively. There is increased competition between Remicade, Humira, and the recently approved product Cimzia to be the market leader. Humira and Cimzia are presenting tough competition to Remicade, which has been in the market the longest. Tysabri has a different mechanism of action from these biologics, but its low safety record compared to other biologics is a concern.

Current Treatment Options are Moderately Successful in Meeting the Market Demand

GlobalData analyzed that the available treatment options are moderately successful in meeting the market demand. Crohn's disease is a chronic condition. Current therapeutics are competing to provide a rapid induction of remission, maintenance of

remission, and mucosal healing. Overall, there is competition to decrease the surgeries and hospitalizations. For people in the moderate to severe disease category, biologics are trying to provide better remission and reduce surgery. However, safety remains a concern. For people in the early stages, there is still a need for better therapy and therefore there are unmet needs in the market. There is a market potential for any new entrant that can cater for these unmet needs. There is enormous opportunity for any drug that would offer better results or retain the efficacy provided by the current players but with increased safety.

Emerging Therapies in Pipeline are Expected to Increase the Competition

GlobalData analyzed that there are over 87 molecules in various stages of the pipeline. Traficet-EN, Myoconda, MLN0002, and Orencia are some of the late stage pipeline molecules. ABT-874, Stelara are some of the promising therapies in the Phase II stage of the pipeline. These pipeline molecules differ in their target of action from the existing therapies, and are likely to offer better safety. They are also likely to benefit patients who have become resistant to anti TNF-alpha therapies. The pipeline has seen an increase in the development of emerging therapies like biologics as they have the ability to change the natural course of the disease. Emerging therapies have gained a positive perception among the physicians in the maintenance of remission. There is likely to be a marginal increase in the prescription of biologics for long term maintenance as they have the capacity to avoid the need for steroids. The emerging therapies are likely to crowd the market and there seems to be a possibility of a price war.

GlobalData: Crohn's Disease - Drug Pipeline Analysis and Market Forecasts to 2015:

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