RealTime Dynamix
Expediting Market Knowledge

Rheumatoid Arthritis EU5

OVERVIEW

The EU biologics market for the treatment of rheumatoid arthritis (RA) is well established with a variety of drugs and mechanisms of action for treatment. Though the backbone TNF-inhibiting biologics have dominated the space for nearly two decades the availability of biosimilars and pending introduction of several new biologics and JAK-inhibitors will alter the treatment paradigm.

The ***RealTime Dynamix: Rheumatoid Arthritis*** report series provides a detailed and timely look at current and future trends in the RA market, and the effects of the future shifting landscape. The bi-annual releases allow for close monitoring and trending of key performance metrics. In addition to the fixed trended measures, the report also includes variable content addressing key current issues that is updated every six months. The rapid field-to-insight turnaround time, highly relevant content, and unparalleled knowledge of the rheumatology market make this an essential tool for companies competing in the space, as well as those with near term plans to enter it.

SAMPLE & METHODOLOGY

The report is based on a 30 minute online survey of ~250 rheumatologists practicing in EU5. Rheumatologists meet screening criteria including time in practice, percent of professional time spent in clinical practice (vs. teaching or research), minimum number of RA patients and minimum number of RA patients on biologic agents. International KOLs (n=10) are not eligible to participate in the survey but contribute to the content through qualitative interviews. Surveys are programmed in the local language.

KEY QUESTIONS ANSWERED

- How is the current and near-term landscape for the RA biologic/JAK market evolving? How does this differ by country?
- How is Olumiant expected to perform in the first year post-approval? How much of an advantage is being the first JAK to market?
- How are biosimilar agents impacting the biologic market?
- How will the new entrants to the IL-6 and JAK classes impact both existing class dynamics and the overall sequencing of treatments?
- What are the critical issues for companies to address for a successful launch into the RA market in each of the EU5 countries?
- What are the critical opportunities and barriers to growth for each brand and class?
- What is the rheumatologist's perception of late stage pipeline assets and how do they anticipate incorporating these assets into their RA treatment?
- How does promotion impact brand use?
- What is the impact of patient preference? What is driving it and how is it influencing brand choice among target physicians?

Products Profiled

Commercial Products:

Roche (RoActemra, MabThera), UCB (Cimzia), Pfizer (Enbrel), AbbVie (Humira) BMS (Orencia), Janssen (Remicade,Simponi), Incyte/Lilly (Olumiant), Biogen/Bioepis (Benepali), Hospira (Inflectra), Celltrion (Remsima)

Pipeline Agents:

Pfizer Xeljanz (tofacitinib), Regeneron/ Sanofi (sarilumab), GSK/Janssen (sirukumab), Gilead/ Galapagos (filgotinib), Medimmune (mavrilimumab), Vitaeris (clazakizumab), AbbVie (upadacitinib), Amgen (Amgevita)*

**The fieldwork was conducted immediately prior to the approval of Xeljanz (March 27) and Amgevita (March 29)*

Key Dates

Q1 2017
- Field: March 14, 2017
- Publish: May 4, 2017

Q3 2017
- Field: September 7, 2017
- Publish: October 3, 2017

Deliverables

- PowerPoint report with country specific data
- On-site presentation and interpretation
- Proprietary Questions
- Custom cross-tabulations

Related Reports 2017

- RealTime Dynamix: Rheumatoid Arthritis US
- RealTime Dynamix: Psoriatic Arthritis US
- RealTime Dynamix: Psoriatic Arthritis EU
- RealTime Dynamix: Rheumatology NP/PA
- RealWorld Dynamix: Biologic/JAK Switching in Rheumatoid Arthritis US
- RealWorld Dynamix: Biologic/JAK Switching in Rheumatoid Arthritis EU
- RealWorld Dynamix: Biologic/Otezla Switching in Psoriatic Arthritis US

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