



## Psoriasis (EU)

### OVERVIEW

The psoriasis market continues to grow, driven by the increasing treatment population and the continued uptake of biologics and advanced therapies. In particular, the alternative mechanism of action (MOA) agents have shown rapid growth, with the recent introductions of Ammirall's Ilumetri, Janssen's Tremfya, and UCB's Cimzia. Tracking the interplay of these treatments will be central to the 2019 report series, as well as assessing the impact of potential new market entrants, including AbbVie/Boehringer Ingelheim's risankizumab, Eli Lilly's mirikizumab, and UCB's bimekizumab.

The **RealTime Dynamix™: Psoriasis (EU)** report series provides a detailed and timely look at current and future trends in the psoriasis 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 updated bi-annually. The rapid field-to-insight turnaround time, highly relevant content, and unparalleled knowledge of the dermatology 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 an online survey of ~250 dermatologists practicing in the EU5 (France, Italy, Germany, Spain, and the UK). Dermatologists meet screening criteria including time in practice, percent of professional time spent in clinical practice (vs. teaching or research), minimum number of psoriasis patients, and minimum number of psoriasis patients on biologic agents. Surveys are programmed in the local language.

### KEY QUESTIONS ANSWERED

- What are the adoption and share trends for Cimzia, Ilumetri, and Tremfya since their launches, and what products are losing to these new entrants?
- What are the profiles of the growing Cimzia, Ilumetri, and Tremfya patient populations?
- Will dermatologists overcome their struggle to differentiate Taltz from Cosentyx?
- How is Otezla holding ground against the increasingly competitive biologics?
- How will TNFs hold up with the growing number of alternative MOAs entering the market?
- What are the key barriers for uptake of the newly launched products?
- What promotional tactics are being employed for the newly launched products?
- What are the adoption rates of newly introduced biosimilars vs. branded products? What is the projected use?
- What is the awareness of the pipeline agents in phase III and which of them are most anticipated to disrupt the current treatment approach?
- How do brand share and perceptions differ across the EU5 countries? How do they differ in the US?

### Products Profiled

#### Commercial Products

AbbVie (Humira), Amgen (Enbrel), Ammirall (Ilumetri), Celgene (Otezla), Eli Lilly (Taltz), Janssen (Stelara, Tremfya), Merck (Remicade), Novartis (Cosentyx), LEO Pharma (Kyntheum), UCB (Cimzia), biosimilars

#### Pipeline Agents

AbbVie/Boehringer Ingelheim (risankizumab), Eli Lilly (mirikizumab), BMS (BMS-986165), UCB (bimekizumab)

### Key Dates

- Q1 January
- Q3 July

*Note: a three day embargo is placed on delivery to non-manufacturers allowing clients time to digest the findings before public dissemination*

### Deliverables

- PowerPoint report
- Frequency tables & summary statistics
- On-site or web-based presentation
- Proprietary questions (for purchasers of the annual series)
- Analyst support

### Related Reports

- *RealTime Dynamix™: Psoriasis US*
- *RealWorld Dynamix™: Biologic/Otezla New Starts in Psoriasis US*
- *RealWorld Dynamix™: Biologic/Otezla Switching in Psoriasis US*
- *RealTime Dynamix™: Atopic Dermatitis EU*
- *RealTime Dynamix™: Atopic Dermatitis US*
- *RealWorld Dynamix™: Moderate-to-Severe Atopic Dermatitis US*
- *RealTime Dynamix™: Psoriatic Arthritis US*