Key Findings

The global autoimmune market generated sales of $31.9bn in 2007, an increase of 14.4% over 2006 sales. The market is forecast to grow at a CAGR of 8.1% to reach a total value of $51.0bn in 2013.

Immunosuppressant drugs dominate the automimmune market, with four products from this class accounting for 40.3% of total market sales. The highest selling immunosuppressant drug was J&J/Schering-Plough's Remicade, with 42.1% of total sales in this class.

Pfizer's Celebrex dominated the COX-II market with a share of 81.3% in 2007. Celebrex maintained blockbuster status despite the earlier withdrawals of major blockbuster COX-II inhibitors such as Vioxx and Bextra.

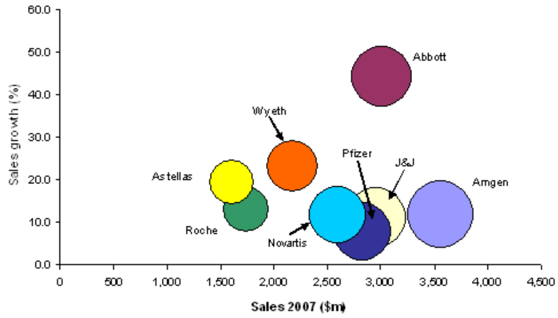


Figure 5.6: Competitive dynamics of leading players in the autoimmune market, 2007

"Roche ($1.7bn) and Astellas ($1.6bn), two of the leading companies in the global autoimmune market, also registered a strong year-on-year sales growth of 13.2% and 19.3% in 2007, driven mainly by the strong sales growth of CellCept and Prograf, respectively..."

Roche's Actemra is expected to be launched in the US during Q1 2010, in view of the FDA's request for additional data and Roche's risk mitigation strategy. Actemra is forecast to generate sales of $680m in 2013.

Amgen is the global autoimmune market leader, having accrued a market share of 11.2% ($3.6bn) in 2007. This was driven almost entirely by Enbrel ($3.5bn) which had a sales increase of 12.2%.

Novartis' developmental MS drug 'fingolimod' (FTY-720) is one of the strongest competitors to Biogen Idec's MS franchise due to its potency and convenience of once daily oral dosing.

Use this report to...

- **Assess patient potential, treatment trends and sales patterns** of major autoimmune indications over the period 2009-13, with this report's coverage of osteoarthritis, rheumatoid arthritis, crohn's disease, systemic lupus erythematosus, ulcerative colitis and multiple sclerosis markets across **Japan, France, Germany, Italy, Spain, the UK** and **the US.**
- **Discover the market dynamics of the autoimmune area and understand the impact of recent events** by assessing key market trends, growth drivers and the latest issues affecting product development.
- **Compare the market performance and strategic positioning** of major pharma companies' autoimmune portfolios with this report's evaluation of the franchises and market shares of **Amgen, Abbott, J&J, Pfizer, Novartis, Wyeth, Roche** and **Astellas.**
- **Evaluate the autoimmune pipeline compounds of leading companies** with this report's detailed analysis of clinically differentiated pipeline products by indication, and sales forecasts for key R&D pipeline products to 2013.

Explore issues including...

Reduced commercial opportunity for Coxibs. The commercial opportunity for the COX-II inhibitor class has been substantially reduced due to cardiovascular safety concerns. The US withdrawals of Vioxx and Bextra, in addition to the non-approvals of Arcoxia and Prexige, are likely to restrict the growth prospects of this class in the near future.

Impact of high value biologic treatments. Orencia, for use in DMARD failures, has yet to significantly affect the growth of existing agents. BMS's Orencia and Roche's Actemra target rheumatoid arthritis patients refractory to anti-TNFs, a population estimated to be between 20-40% of moderate/severe RA patients.

Cost of MS treatments. Research has shown that the cost of being diagnosed with MS in the UK is nearly £17,000 per person. The research also found that among 2,000 people surveyed from across the UK, half stated that they had to leave work due to MS, which increased the potential cost to over £25,000 per person when lost employment productivity is added.

Importance of arthritis disease management. Although several novel artrhitis treatments have been launched in recent years, it is possible for many patients to acheive effective disease control from the better use of existing medications.

Brand	Generic	Company	Sales ($m) 2007	Growth 06-07 (%)	Market share 2007 (%)
Celebrex	celecoxib	Pfizer	2,296	10.2	81.3
Arcoxia	etoricoxib	Merck	320	25.6	11.4
Prexige	lumiracoxib	Novartis	101	120.6	3.6
Dynastat	parecoxib	Pfizer	33	17.9	1.2
Tauxib	etoricoxib	Merck	16	1.3	0.6
Exxiv	etoricoxib	Merck	15	0.7	0.6
Solexa	celecoxib	Pfizer	4	29.9	0.2
Nucoxia	etoricoxib	Zydus Cadila	3	13.2	0.1
Etrobax	etoricoxib	Ranbaxy	2	9.1	0.1
Artilog	celecoxib	Esteve	2	0	0.1
Leading brands		**2,798**	**14**	**99.1**	
Others			26	7.1	0.9
Total			**2,824**	**13.9**	**100**

Figure 3.27: Leading coxib brands in the global autoimmune market, 2006–07

"Sales of the leading COX-2 inhibitors accounted for 99.1% of the global COX-2 market in 2007, with a modest growth of 14.0% in sales over 2006–07. Sales of Pfizer's Celebrex ($2.3bn) dominated the COX-2 market, with an 81.3% share in 2007..."

Discover...

- What will be the major growth indications in the autoimmune market over 2007–13?
- Which companies were the winners and losers in this market in 2007?
- How have major launches from companies such as Amgen, Roche, Abbott and J&J performed?
- Which companies will become key players in the autoimmune market over 2007–13?
- Which products will be affected by generic competitors over the period 2007–13?
- Which pipeline products will be the growth drivers of the future?
- Which indications have the highest levels of market potential over the period 2007–13?
- What will be the competitive landscape in osteoarthritis, rheumatoid arthritis, crohn's disease, lupus, ulcerative colitis and multiple sclerosis in 2013?

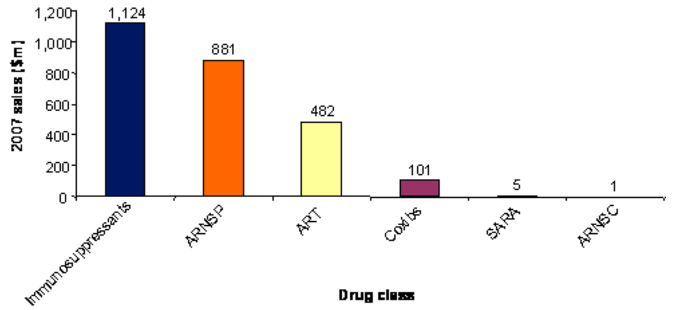
Sample Information

Chapter 5: Competitive landscape

Sales focus by drug class

Novartis markets a broad range of products across a range of therapy areas and has very comprehensive coverage of drug classes when compared to other pharmaceutical companies featured in this report. The majority of Novartis' sales are derived from products falling under the immunosuppressant class of drugs with the key drug being Sandimmun (cyclosporine), which was responsible for $831m sales in 2007. Voltaren, an NSAID accrued $1.1bn in 2007, making it the company's top selling drug in 2007. Voltaren is marketed in different formulations ranging from oral to topical, and thus sales accrued by Voltaren contribute towards products falling under the plain NSAIDs as well as topical anti-rheumatic agents.

Figure 5.11: Novartis' autoimmune sales by drug class, 2007



Business Insights

Marketed product portfolio

Novartis' autoimmune franchise registered a growth rate of 11.7% in 2006–07, representing sales of $2.6bn in 2007. Voltaren, the company's top selling product has witnessed a strong y-o-y sales growth of 9.7% or $1.1bn in 2007. Marketed as an oral tablet as well as a topical formulation, the oral formulation of Voltaren had witnessed a stronger sales performance in 2006, accounting for 58.2% of total product sales.

Table 5.57: Novartis' autoimmune product portfolio, 2006–07

Brand	Generic	US patent expiry date	Expected Sales 2007 ($m)	Growth 2006–07 (%)
Voltaren	diclofenac	exp	1,055	9.7
Sandimmun	cyclosporin	exp	831	2.3
Myfortic	mycophenolate	n/a	149	63.3
Prexige	lumiracoxib	2018	101	120.6
Simulect	basiliximab	2013	67	11.6
Ketonal	ketoprofen	exp	53	20
Certican	everolimus	n/a	50	85.5
Indometacin	indomethacin	exp	47	4.4
–	nabumetone	exp	44	2.9
–	diclofenac	exp	34	-16.8
Others		–	160	7.9
Total		–	**2,596**	**11.7**

Business Insights

Major growth drivers Novartis' autoimmune portfolio include Myfortic, which registered a strong y-o-y sales growth of 63.3%, garnering sales of $149m in 2007. Myfortic is indicated for the reduction of organ rejection during renal transplants. The drug has strong clinical efficacy and tolerability profiles, translating into strong market performance since its launch in 2004. Certican, a novel proliferation signal inhibitor with immunosuppressive and anti-proliferative properties is indicated for the treatment of organ rejection in transplantation, garnered sales of $50m in 2007, representing y-o-y sales growth of 85.5%. Prexige, a COX-2 inhibitor, registered the strongest growth rate of 120.6% among all products featured in Novartis' autoimmune franchise during the 2006–07 period. *(Continued...)*

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