



## Psoriasis (US)

### OVERVIEW

The Psoriasis (PSO) 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 Eli Lilly's Taltz, Janssen's Tremfya, Novartis' Cosentyx, and Valeant's Siliq. Tracking the interplay of these treatments will be central to the 2018 report series, as well as assessing the impact of potential new market entrants, including, AbbVie/Boehringer Ingelheim's risankizumab, Merck/Sun Pharma's tildrakizumab, UCB's bimekizumab, and UCB's Cimzia.

The **RealTime Dynamix™: Psoriasis (US)** report series provides a detailed and timely look at current and future trends in the PSO market and the effects of the future shifting landscape. The quarterly 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 quarterly. 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 ~100 US dermatologists and is fielded on a quarterly basis. Respondents are recruited from the Spherix Network, a proprietary group of dermatologists in clinical practice meeting quality screening criteria. Our relationship with this network leads to more engaged respondents resulting in higher quality output.

### KEY QUESTIONS ANSWERED

- How will the entrance of Taltz and Siliq impact overall IL-17 class share vs. compete for share with Cosentyx?
- Will dermatologists overcome their struggle to differentiate Taltz from Cosentyx?
- What is the impact of the growing IL-17 class on Stelara and anti-TNF use?
- What are the adoption and share trends for Tremfya since the launch and what products are losing to this new entrant?
- What is the profile of the growing Tremfya patient population?
- 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 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?

### Products Profiled

#### Commercial Products

AbbVie (Humira), Amgen (Enbrel), Celgene (Otezla), Eli Lilly (Taltz), Janssen (Remicade, Stelara, Tremfya), Novartis (Cosentyx), Ortho Dermatologics/Valeant (Siliq), Infliximab biosimilars

#### Pipeline Agents

AbbVie/Boehringer Ingelheim (risankizumab), Amgen (Amgevita), Merck/Sun Pharma (tildrakizumab), UCB (bimekizumab, Cimzia)

### Key Dates

- Q1 March
- Q2 June
- Q3 August
- Q4 November

*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 2018

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