



Rheumatoid Arthritis (US)

OVERVIEW

The US biologics and small molecule 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, more recent launches, an active pipeline, and the introduction of biosimilars present an opportunity for major future shifts in the RA landscape.

The **RealTime Dynamix™ Rheumatoid Arthritis (US)** 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 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 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 an online survey of ~100 US rheumatologists and is fielded on a quarterly basis. Respondents are recruited from the Spherix Network, a proprietary group of rheumatologists 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

- What is the current and future landscape of the RA biologic/JAK market?
- What are the adoption and share trends for Kevzara since its mid 2017 launch and what is the market impact of this new entrant?
- 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?
- 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?
- How are payer policies evolving and how does this impact brand choice and line of therapy?

Products Profiled

Commercial Products

AbbVie (Humira), Amgen (Enbrel), Biogen/Genentech (Rituxan), BMS (Orencia), Celltrion/Pfizer (Inflectra), Genentech/Roche (Actemra), Janssen (Remicade, Simponi), Merck (Renflexis), Pfizer (Xeljanz), Regeneron/Sanofi (Kevzara), UCB (Cimzia)

Pipeline Agents

AbbVie (upadacitinib), Eli Lilly (LY3337641), Eli Lilly/Incyte (Olumiant), EMD Serono (evobrutinib), Galapagos/Gilead (filgotinib)

Key Dates

- Q1 Feb
- Q2 May
- Q3 July
- Q4 November

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

Deliverables

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

Related Reports 2018

- *RealTime Dynamix™: Rheumatoid Arthritis EU*
- *RealWorld Dynamix™: Biologic/JAK Switching in Rheumatoid Arthritis US*
- *RealWorld Dynamix™: Biologic/JAK Switching in Rheumatoid Arthritis EU*
- *RealTime Dynamix™: Psoriatic Arthritis US*
- *RealWorld Dynamix™: Biologic/Otezla Switching in Psoriatic Arthritis US*
- *RealTime Dynamix™: Ankylosing Spondylitis and Nr-AxSpA US*
- *RealWorld Dynamix™: Systemic Lupus Erythematosus*