OVERVIEW

The EU inflammatory bowel disease (IBD) market has been experiencing large-scale changes as gastroenterologists continue the adoption of alternative mechanism-of-action (MOA) biologics and the biosimilar agents for infliximab and adalimumab, which are strongly favored in the more restrictive health care systems in the EU compared to the US. The extent to which newer agents have been adopted to treat IBD patients, especially those who have failed one or more anti-TNF agents and need the efficacy offered by an alternative MOA, will be explored.

The RealTime Dynamix™: Inflammatory Bowel Disease (EU) report series provides a detailed and timely look at current and future trends in the IBD market and the effects of the future shifting landscape. The 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 annually. The rapid field-to-insight turnaround time, highly relevant content, and unparalleled knowledge of the IBD 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 gastroenterologists practicing in the EU5. Gastroenterologists meet screening criteria including time in practice, percent of professional time spent in clinical practice (vs. teaching or research), minimum number of IBD patients, and minimum number of IBD patients on biologic agents. Surveys are programmed in the local language.

KEY QUESTIONS ANSWERED

- What are the profiles of physician’s managing IBD and how does this vary by country?
- What are the similarities and differences in the use of biologics for UC and Crohn’s among member states and how much variance is there to the EMEA guidelines at a country level?
- How are newer, alternative MOA agents being adopted in the EU and how does their use vary by country and compare to the US?
- How have the differences in country level approval process, healthcare system structure, and physician practice impacted IBD patient management with biologic agents?
- Who are the winners and losers in crowded and competitive biosimilar segment?

Products Profiled

EMEA Approved in IBD (UC & Crohn’s)

Original Branded Products: AbbVie (Humira), Janssen (Remicade), Takeda (Entyvio)

Biosimilars: Hospira (Inflectra), Celltrion (Remsima), Amgen (Amgevita, Solymbic), Boehringer Ingelheim (Cylezo), Samsung Bioepis (Imraldi, Flixabi), Sandoz (Zessly)

UC only: Janssen (Simponi)
Crohn’s only: Janssen (Stelara)

Pipeline Agents

AbbVie (rizankizumab, upadacitinib), Celgene (ozanimod), Eli Lilly (mirikizumab), Gilead/Galapagos (Filgotinib), Janssen (Stelara UC indication), Pfizer (Xeljanz), Roche/Genentech (etrolizumab), Takeda (Entyvio SC formulation)

Key Dates

- September Publication

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
- Analyst support

Related Reports 2018

- RealWorld Dynamix™: Biologic Switching in IBD EU
- RealTime Dynamix™: Inflammatory Bowel Disease US
- RealWorld Dynamix™: Biologic Switching in IBD US
- RealWorld Dynamix™: Biologic New Starts and Restarts in IBD US

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