

Evolving Treatment Dynamics and Persistent Unmet Need in Atopic Dermatitis: Insights from EU5 Dermatologists

Andrew Stankus¹, Sophia Recchilungo¹, Shirley Chen¹, Colleen Carpinella, PhD¹, Jordan Talia, MD²

¹Spherix Global Insights, Exton, PA, USA; ²Mount Sinai Health System, New York, NY, USA

BACKGROUND

The treatment landscape for atopic dermatitis (AD) has rapidly expanded with the introduction of advanced systemic therapies, including biologics and JAK inhibitors. Despite these innovations, heterogeneity in the disease, variability in severity, treatment response, and patient eligibility continue to challenge optimal disease management across EU5 markets.

OBJECTIVES

To assess current treatment patterns, unmet needs, and perceptions of recently approved and emerging therapies among dermatologists managing AD patients in the EU5.

METHODS

Data are drawn from the RealTime Dynamix™ Atopic Dermatitis EU5 Q1 2026 insights, based on a quantitative survey of 250 dermatologists across France, Germany, Italy, Spain, and the UK, conducted between January and February 2026. The study evaluates patient unmet need, prescribing drivers, treatment utilization and satisfaction, and perceived barriers to the use of advanced systemic therapies.

RESULTS

Nearly two-thirds of the adult AD patient population is moderate-to-severe, reinforcing their role as the primary candidates for advanced systemic therapies. Among surveyed physicians, 52% of adult moderate-to-severe AD patients are treated with an advanced systemic therapy (including biologics and small molecules), a figure that is expected to grow. (FIGURE 1) Overall, pharmacologic treatment rates are high across all markets (85%-91%). Despite the wide range of therapies currently available, one-third of dermatologists continue to report a significant unmet need for new AD treatments. (FIGURE 2)

The competitive landscape is increasingly dynamic and fragmented. Dupilumab maintains a leading position, currently garnering 47% of advanced systemic brand share; however, newer agents, including upadacitinib (15%) and lebrikizumab (14%), capture disproportionate new prescription share, signaling growing physician willingness to adopt alternative mechanisms. (FIGURE 3) This shift reflects both expanding therapeutic optionality and a lack of clearly differentiated and universally effective treatments.

Treatment decision-making is driven by efficacy in skin clearance for all advanced systemic therapy options, efficacy in itch reduction (nemolizumab), safety profile (dupilumab and tralokinumab), and mechanism of action (lebrikizumab, nemolizumab). Dermatologists increasingly place an emphasis on mechanism-based differentiation as the number of available options grows. While satisfaction with currently available therapies is generally moderate to high (7.1 to 8.6 out of 10), the absence of strong preference for any single agent and emphasis on MOA differentiation suggests recent innovations are perceived as incremental rather than transformative.

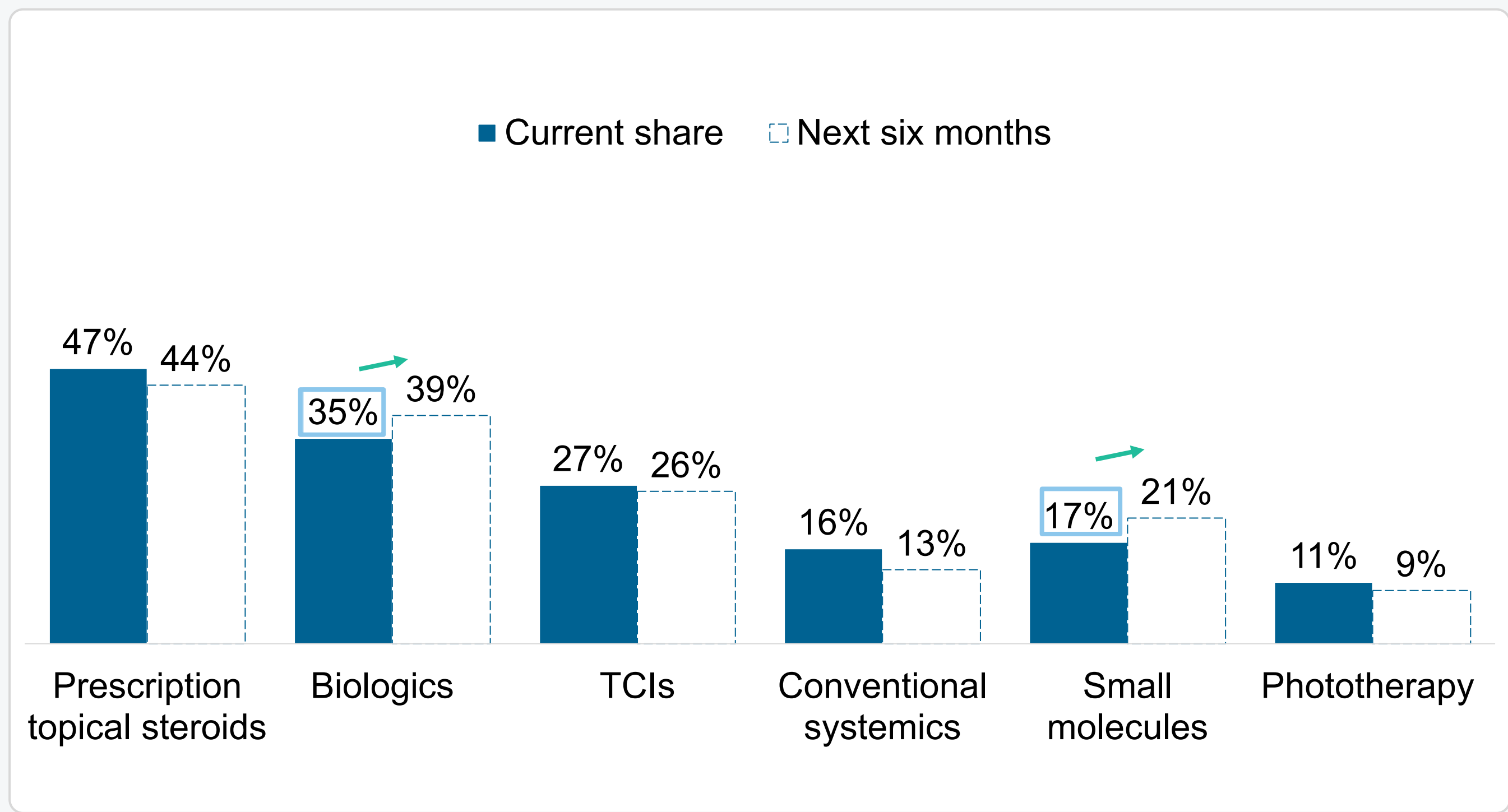
Barriers to broader and earlier adoption of advanced systemic therapies persist, with 32% of physicians expressing concerns about long-term safety with upadacitinib, 27% with abrocitinib, and 22% with baricitinib. Nearly one-quarter of physician's report that dupilumab faces patient concerns regarding needle phobia, and nemolizumab continues to face familiarity challenges with 22% of physicians and reimbursement barriers with 16% of physicians. (FIGURE 4) These factors may contribute to delayed initiation and conservative use, even in patients who may benefit from earlier intervention.

At the same time, awareness of recently approved and emerging therapies is nearly universal, with 96% of dermatologists reporting unaided awareness of newly approved AD treatments. This underscores strong engagement with innovation while also reflecting an increasingly crowded and complex treatment landscape.

FIGURE 1

Self-Reported Current and Future AD Treatments for Adults– EU5 Total

% of patients

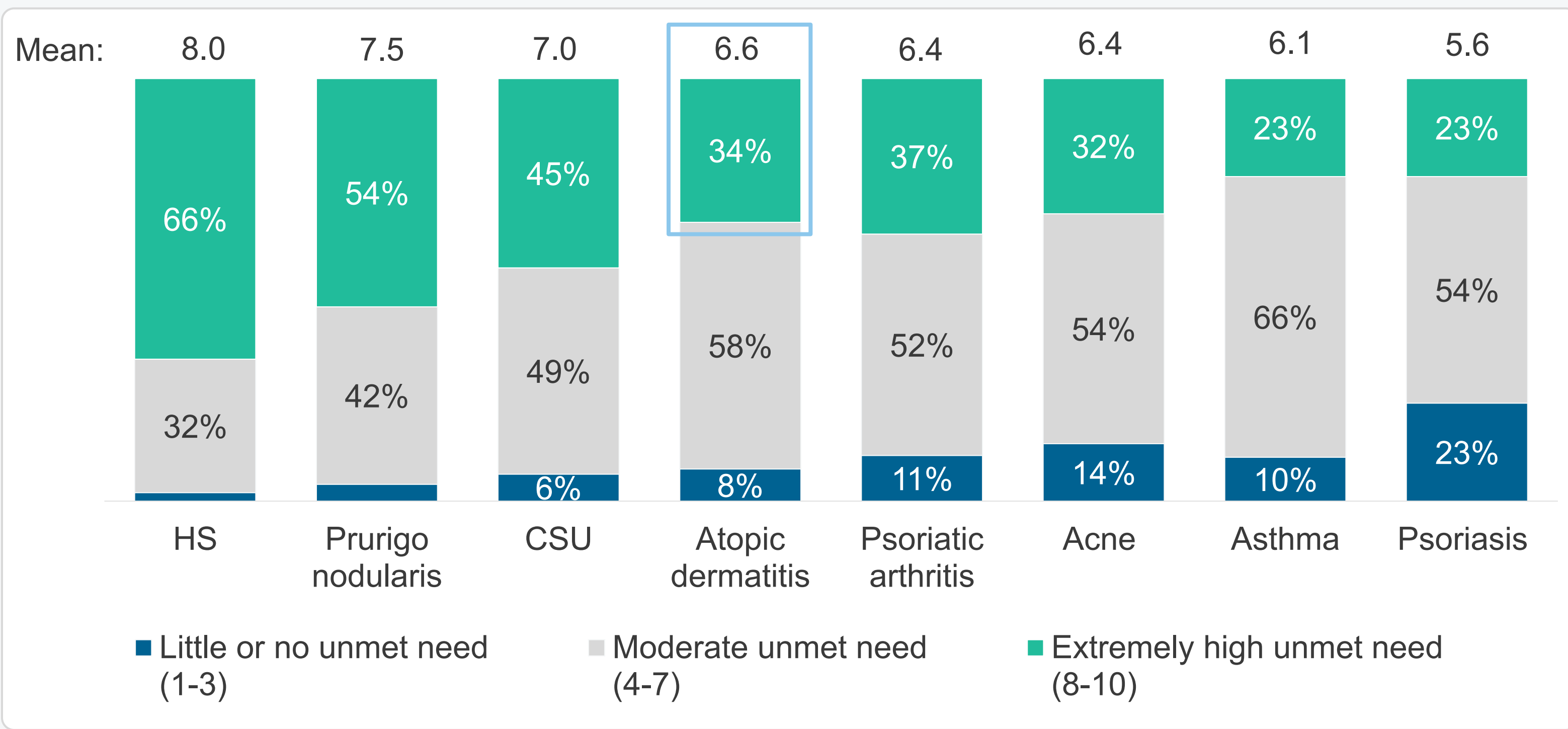


Report source: RealTime Dynamix Atopic Dermatitis EU5 Q1 2026

FIGURE 2

Unmet Need in Dermatology – EU5 Total

% of respondents

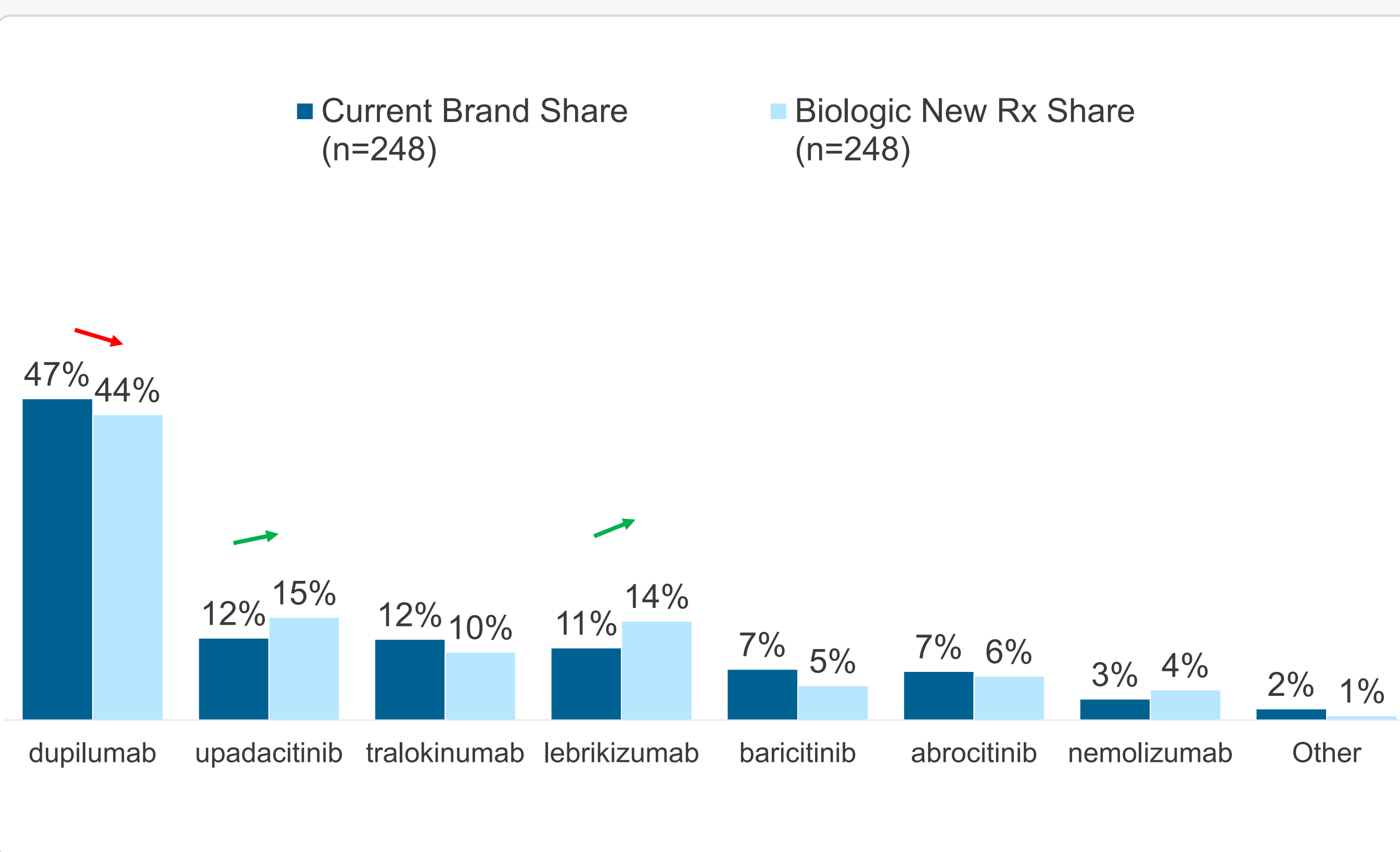


Report source: RealTime Dynamix Atopic Dermatitis EU5 Q1 2026

FIGURE 3

Current Brand Share Vs. New Prescription Share – EU5 Total

% of patients vs. % of new prescriptions

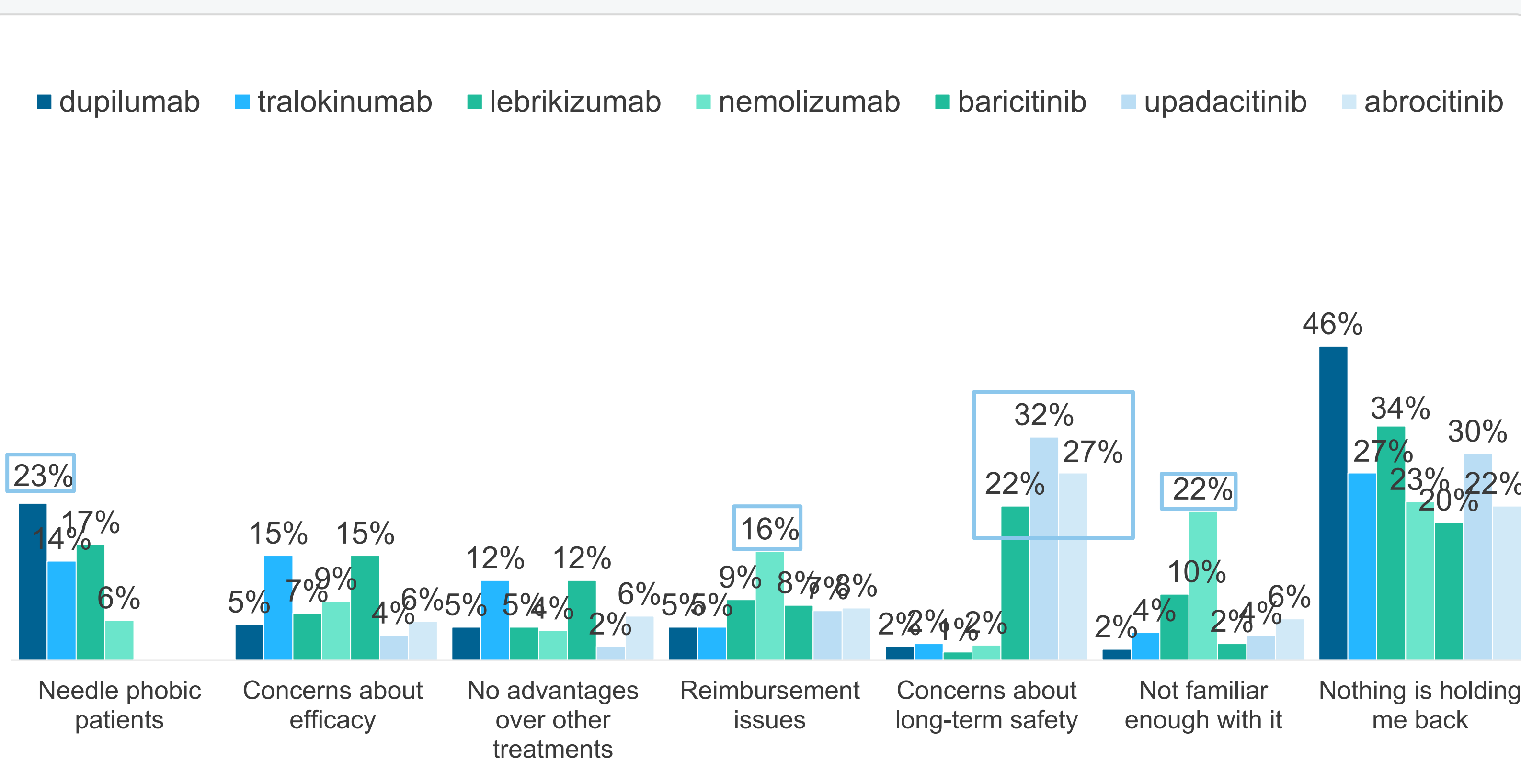


Report source: RealTime Dynamix Atopic Dermatitis EU5 Q1 2026

FIGURE 4

Primary Barriers to Use by Brand – EU5 Total

% of respondents



Report source: RealTime Dynamix Atopic Dermatitis EU5 Q1 2026

CONCLUSION

The AD treatment landscape is increasingly competitive, unmet needs remains high, particularly in moderate-to-severe disease, due to ongoing challenges with efficacy, safety, patient selection, and access. Future differentiation depends on improved durable efficacy, enhanced safety and patient targeting. High awareness of emerging therapies highlights strong physician demand for novel treatments to address these persistent unmet needs.

POSTER DETAILS

ACKNOWLEDGMENTS

The Spherix Global Insights team wishes to express our appreciation to the dermatologists who participated in this research.

DISCLOSURES

Spherix Global Insights is an independent market intelligence and advisory firm that has not received any industry funding to conduct and report on this study. Dr. Jordan Talia has served as a consultant for AbbVie, Arcutis Biotherapeutics, Bristol-Meyers Squibb, Calliditas Therapeutics, Galderma, Johnson & Johnson, Leo Pharma, Novartis, Navigator Medicines, Primus Pharmaceuticals, Sanofi Genzyme, Stifel Financial, and UCB. He serves as an investigator for LEO Pharma, Prioivant Therapeutics and Sanofi. He is a shareholder of Nektar Therapeutics.

REFERENCES

Spherix Global Insights. RealTime Dynamix™: Atopic Dermatitis (EU5), Q1 2026. Proprietary market research study.

Scan here to view our poster

