

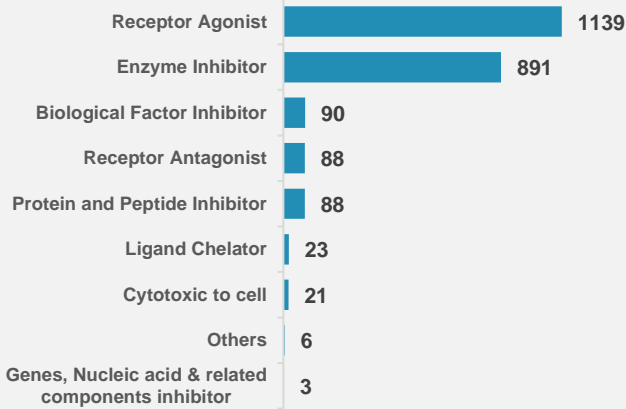
ADVANCEMENTS IN RHEUMATOID ARTHRITIS:

CURRENT AND FUTURE THERAPY OVERVIEW

The rheumatoid arthritis (RA) drug market is predominantly composed of receptor antagonists and enzyme inhibitors, with 19 leading drugs, such as Rituxan by Biogen, currently available. Challenges from biosimilar erosion exist, and the landscape is marked by ongoing R&D with 519 drugs in development. Recent months have seen notable mergers and acquisitions in the RA drug development sector.

CURRENT LANDSCAPE

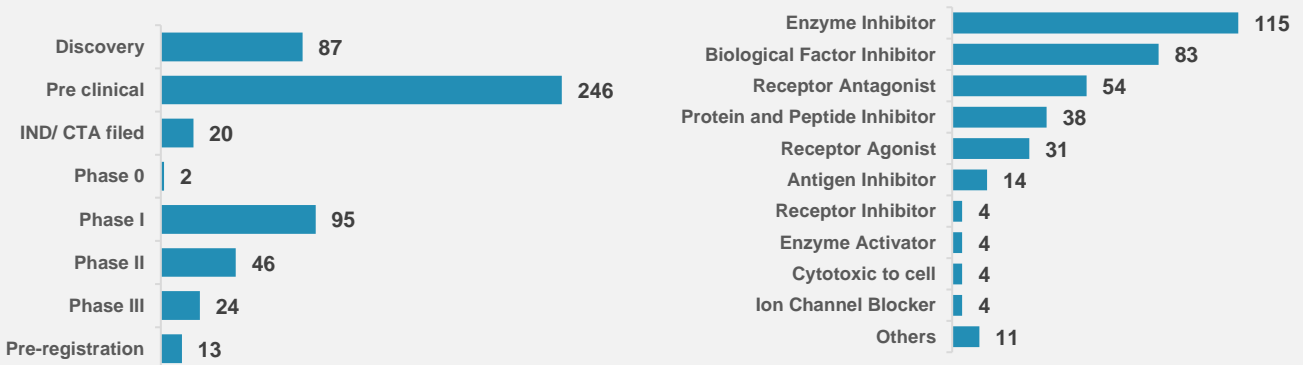
The RA drug market is dominated by receptor antagonists and enzyme inhibitors, featuring 19 leading drugs, including Rituxan by Biogen, and is historically led by major players such as Pfizer, Biogen, Roche, Janssen, and AbbVie.



- Majority of RA drugs available in the market belong to the categories of receptor antagonists and enzyme inhibitors.
- There are currently 19 leading drugs being marketed for RA treatment, with Biogen's Rituxan (rituximab) being the pioneer product introduced in 1997.
- Janssen plays a significant role in the RA landscape, offering two marketed products, Remicade (infliximab) and Simponi (golimumab).
- However, these therapies, like several others in the current market, are facing challenges from biosimilar erosion. Notably, a substantial portion of RA drugs falls under the Tumor Necrosis Factor inhibitor category.
- The landscape of currently marketed RA treatments has long been dominated by major pharmaceutical players, including Pfizer, Biogen, Roche, Janssen, and AbbVie.

FUTURE PIPELINE LANDSCAPE

R&D activity is high in the RA space. Dominant mechanisms of action among the pipeline drugs undergoing development for RA include enzyme inhibitors, biological factor inhibitors, and receptor antagonists. Out of 519 drugs in development for RA, 2.4% are in pre-registration, 4.5% are in Phase III, 8.6% are in Phase II, and 17.8% in Phase I.



The most recent entrants in the current RA market that are expected to capture market share are Amgen's Pralia, Regeneron's Kevzara, Galapagos's Jyseleca, Eisai's Careram, R-Pharm's Artlegia, Astellas's Smyraf, Pepto Pharma's Thymodepressin, and Taisho Pharma's Nanzora.

Recent Entrants	Future Players

CURRENT LANDSCAPE

During the past 18 months, quite a few M&A and strategic alliances have taken place involving companies developing RA assets.

Key Players Involved in Dealmaking	Deals
  	In August 2023, Zevra Therapeutics announced plans to acquire Acer Therapeutics for ~USD91 Mn.
  	Harmony Biosciences announced its plan to acquire Zynerba Pharma for ~USD200 Mn in August 2023.
  	In 2023, Aspen Global announced plans to acquire a portfolio of products from Viatris in Latin America for USD280 Mn.
  	In May 2023, Biomed Industries announced it would acquire 100% stake in Neoleukin Therapeutics for USD68.5 Mn.
  	In March 2023, Kumho Ht announced plans to sell 2.4% stake of CrystalGenomics for USD21.56 Mn.
  	In February 2023, VBL Therapeutics announced its plan to merge with Notable Labs.

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HOW CAN ARANCA HELP?

- 01 Epidemiological Analysis:** Prevalence and diagnosis of the diseases based on geography, gender, race and ethnicity, etc.
- 02 Diagnosis and Treatment Paradigm:** Analysis of diagnosis and treatment algorithm adopted in clinical practice
- 03 Current and Future Landscape:** Current treatments and latest pipeline landscape assessment for a particular therapy area
- 04 Humanistic, Economic Burden, and Unmet Need Analysis:** Impact of a disease on the patient's mental and economic well-being
- 05 Health Technology Assessment:** Analysis of various HTA decisions published by various countries

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