

ASTHMA – COMPETITIVE LANDSCAPE

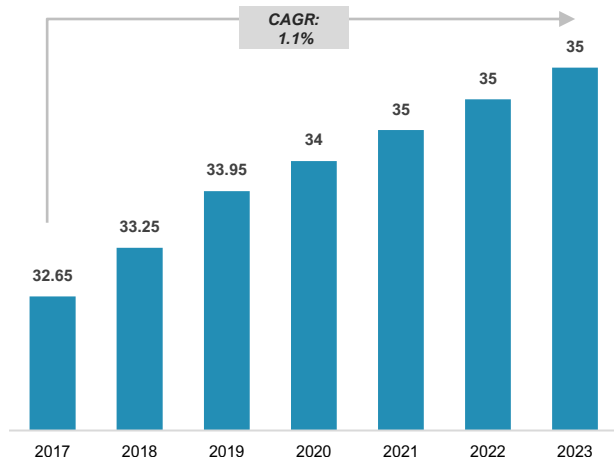
CURRENT AND FUTURE LANDSCAPE

Asthma is a major non-communicable disease (NCD), affecting both children and adults, and is the most common chronic disease among children. In 2022, ~455,000 deaths globally were attributed to this chronic condition. Long- and short-acting beta-agonists and inhaled corticosteroids are most commonly used for the treatment of asthma. However, the access and affordability of these medication still present an obstacle in low- and middle-income countries.

DISEASE PREVALANCE

Global 2022 | Figures in Mn

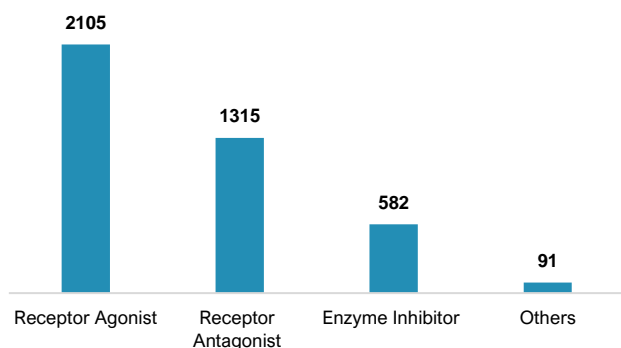
The global burden of asthma has grown at the rate of ~1% for 2017-25 owing to factors such as increasing pollution, lifestyle changes, and unequal access to healthcare.



- In 2022, about 260 million asthma cases were projected across 16 major geographies, with factors such as urbanization, air pollution, and socioeconomic inequalities contributing to the rise in the disease.
- However, initiatives such as the Global Action Plan for NCDs prioritize asthma as a major condition and are now devising strategies for its prevention, control, and management.

MECHANISM OF ACTION OF MARKETED DRUGS

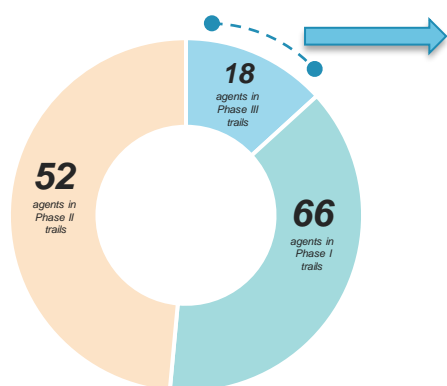
The current leading marketed drugs in asthma include IL-4R and IL-5R antagonists, an IgE inhibitor, a CHRM3 antagonist, and ADRB2/glucocorticoid receptor agonists.



- Globally, about 30% of the patients are prescribed with long-acting beta-agonist (LABA) for treating asthma.
- The access and affordability of these medication are a global concern. For example, the branded version of Salmeterol (LABA) costs ~USD 497.
- Unitaid's Asthma Price Reduction initiative aims to lower the cost of asthma medication in low- and middle-income countries, addressing global challenges to access and affordability.



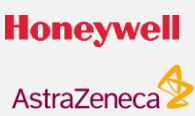
PIPELINE DEVELOPMENT

In the asthma pipeline, most of the drugs currently in Phase III stage of clinical development are targeting ADRB2 or IL-4 and 5.



Company	Therapy Class	Drug Name
REGENERON	IL4R antagonist	Dupilumab
AstraZeneca	IL5R antagonist	Benralizumab
gsk	Glucocorticoid receptor agonist	Fluticasone furoate
NOVARTIS	ADRB2 agonist, CHRM3 antagonist, glucocorticoid receptor agonist	Glycopyrrolate + indacaterol + mometasone furoate
gsk	IL5R inhibitor	Depemokimab
AstraZeneca	ADRB2 agonist	PT-007 (albuterol sulfate)

RECENT COLLABORATIONS:

Collaborators	Description
	In 2022, Upstream Bio acquired UPB-101 , a medication used for asthma and chronic rhinosinusitis, from Astellas Pharma with a funding of USD 200 Mn.
	In February 2022, Glenmark Pharmaceutical's subsidiary Glenmark Pharmaceuticals Colombia S.A.S. and AstraZeneca entered into an exclusive licensing agreement for the commercialization of AstraZeneca's drug Pulmicort Respules .
	In 2022, AstraZeneca partnered with Honeywell to develop next-generation respiratory inhalers using the propellant HFO-1234ze , which has up to 99.9% less global warming potential than propellants currently used in respiratory medicines.

The future of asthma medications promises personalized precision therapies, aiding the fight against this chronic condition.

Right from understanding key issues to advising you through the right set of insights and recommendations, Aranca's research, consolidation, and insightful analysis will aid in-depth understanding of therapy and effective decision-making.

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 HTA decisions published by various countries

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