



# The Global Dermatology Market 2013-2023

*Pharmaceutical, Commercial, & Strategic Developments in Global Dermatology*

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## 1.2 Chapter Breakdown

The chapters of this report cover the following topics.

**Chapter 1** is an executive summary.

**Chapter 2** introduces the Dermatological diseases, types, symptoms and treatments available.

**Chapter 3** discusses current trends, issues and developments along with the major players' landscape.

**Chapter 4** analyses the dermatological drugs market in 2012-13 and forecasts market growth for 2013-2023. Key approved and pipeline products for each disease are discussed.

**Chapter 5** discusses the leading companies operating in the dermatological drugs market, looking at those with currently marketed therapies, as well as those with promising R&D pipeline products.

**Chapter 6** Analysis the key countries that make up the global dermatological market.

**Chapter 7** Contains original interviews with 3 key dermatological market players.

## 1.3 RESEARCH AND ANALYSIS METHODS

This report harnesses primary and secondary research. This study provides world market forecasts and analyses of market drivers and restraints (including forecast analyses) and principal developments. Our analyses are original, benefiting from our consulting experts in industry, academia, medical practice and other roles. Our analysts also refer to industry data, company reports, news and trade articles, public health data, policy documents and other

analysts' views. We conduct primary research by telephone interviews, correspondence or face-to-face discussions.

Our report contains quantitative and qualitative analytical content, covering the present and future of the markets. Although our report is market-centred, we include medical and technical information. We include analyses of under-met market needs from the present looking forward. Our revenue forecasting assesses the magnitude and effects of driving and restraining forces, to determine annual growth and total sales across a series of years. We base our forecasts upon knowledge of financial performance, disease prevalence, substitution, product/technology characteristics and other factors, as well as data and opinions gathered from our primary and secondary research.

Products and vendors listed in this report are provided for reference and constitute neither a complete list, necessarily, nor an endorsement of any specific vendor or product. Also, in this report, only human cell products are considered.

Revenue figures in this report are for the respective world market, or market segment, unless stated otherwise. Tabulated revenue values for later years (2013 onwards) are whole-year predictions (January to December). Because of rounding, values may not add up exactly. Compound annual growth rate (CAGR) values are for 2013-2023.



## Chapter 4.1: Global Acne Market - 2013 -2023

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### 4.1.1. Major Trends & Issues

1. **Shift towards combination products:** The market is currently experiencing a gradual shift towards combination products that use two or more effective acne treatments. Currently marketed combination products, such as Duac (clindamycin phosphate and benzoyl peroxide) and Ziana (clindamycin phosphate and tretinoin), are expected to steadily increase revenue generation.
2. **Safety concerns on current drugs:** There is a serious concern of safety and efficacy in terms of the current drugs available. The drugs that are currently marketed are unable to treat acne completely. Instead, they reduce the lesions by half but are unable to suppress re-occurrence of acne.

The present drugs are also unable to target all the factors involved in acne pathology. Topical applications can turn the skin dry, irritated, red and can cause a burning sensation. Oral medications that include antibiotics and retinoid have led to increased hepatotoxicity, gastrointestinal issues and suicidal tendencies, along with the above mentioned issues.

### 4.1.2 Market Size & Forecast

1. The acne market across the seven major markets was estimated to be around \$3.1 bn in 2012 covering approximately 50 million people.
2. The acne medication market is currently dominated by generic products. Branded products now account for a relatively small portion of the overall market, however Differine and Solodyn are the major drugs and generate global revenues in the range of hundreds of millions.
3. Revenue growth slowdown has been attributed to the entry of generics coupled with increased acceptance of alternative therapies such as photodynamic therapy and Ultraviolet (UV)/blue light therapy for acne treatment.
4. Patent of Epiduo (benzoyl peroxide and adapalene) expired in late 2011, Duac will expire in 2014 these factors will aid growth of the acne market during the forecast period.
5. Accutane (tretinoin) was withdrawn from the acne market due to severe adverse events such as inflammatory bowel disease (IBD), ulcerative colitis and Crohn's disease identified with prolonged usage of Accutane.
6. As per GMR Data estimates, the market is forecasted to reach \$XX bn in 2023 with a 10 year CAGR of XX%.

Table 4.1.2.a. Market Size &amp; Forecast – Acne Market

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	10 yr CAGR
\$ bn	3.0	3.1	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX%
% Growth	---	3.3%	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX	---

GMR Data 2013

Table 4.1.2.b. Market Share – By Revenue

Drug	2012 Revenue (\$m)	Market Share (%)
Isotretinoin	XX	14%
Topicals (Retinoid/Antibiotics)	XX	9%
Oral Antibiotics	XX	12%
Other orals	XX	65%
<b>Total</b>	<b>XX</b>	<b>100%</b>

GMR Data 2013