SAMPLE

The Global Dermatology Market 2018 to 2028

Pharmaceutical, Commercial and Strategic Developments in the Global Dermatology Market 2018-2028

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Chapter 1 - Executive Summary

1.1 Executive Summary

The dermatological diseases/conditions studied in this report - Atopic Dermatitis, Psoriasis, Rosacea, Alopecia, Skin Infections, Skin Cancer and Acne and respective markets, collectively were moderately growth markets prior to 2013 with CAGR of 4% - 5%. Investment in R&D was low with 1 or 2 new drug molecules/'first-in-class' therapies in clinical trials.

From 2013, however, the global Dermatological Drugs market witnessed almost a complete trend-reversal as more than 7 new drug molecules/'first-in-class' therapies per dermatological disease/condition were approved by the U.S. FDA and also in the EU market (during 2014, 2015). Based on the new drug approvals, the overall global Dermatological Drugs market CAGR therefore – is forecast to increase to 6.4% from 2018 - 2028. The global Dermatological Drugs market can be aptly summarised at an 'inflection point'.

Each therapy area covered in this report has its innate idiosyncracies, for example, the Skin Cancer market displays a 'value play' with ImmuneTherapies priced upwards of $50,000 being prescribed for patients; however increasing popesntiy towards affordable healthcare is leading manufacturers to negotiate with insurers prior to a drug launching and perhaps scale-down prices to $30,000 per therapy.

The Skin Cancer market seems strong with a 10 year CAGR of 9.2%. Notwithstanding the apparent attractiveness, the key note here is - there are 65 new (pipeline) drug molecules. The Skin Cancer market could therefore be a saturated market by 2021 - leaving less scope for new entrants. Almost all the technologies/pathways to counter Melanoma/Basal and Squamous Cell Carcinomas are discovered and being developed - further limiting scope for new investors in this market. Additionally, there is low probability that any other/new drug will witness success an '*accelerated approval*' as observed for 'blockbuster' Skin Cancer drugs commercialized since 2014 i.e. Keytruda and Opdivo.

Akin to the Skin Cancer market, the Psoriasis market reflects a similar scenario; '*tried-and-tested*' drugs or therapies of Biologics (Enbrel, Stelara, Humira) already garnered a majority market share percentage; there will also be new claimants for the market share with few economic Biosimilars launched in the Psoriasis market. Possibilities of any new drug gaining '*breakthrough*' status (as of 2018) appear rare - as a couple of such drugs, namely Otezla and Piclidenoson, have been available since 2014. All the afore-mentioned factors, thus limit scope for any new entrants as the ROI is likely to be sub-optimal for new investors in Psoriasis market.

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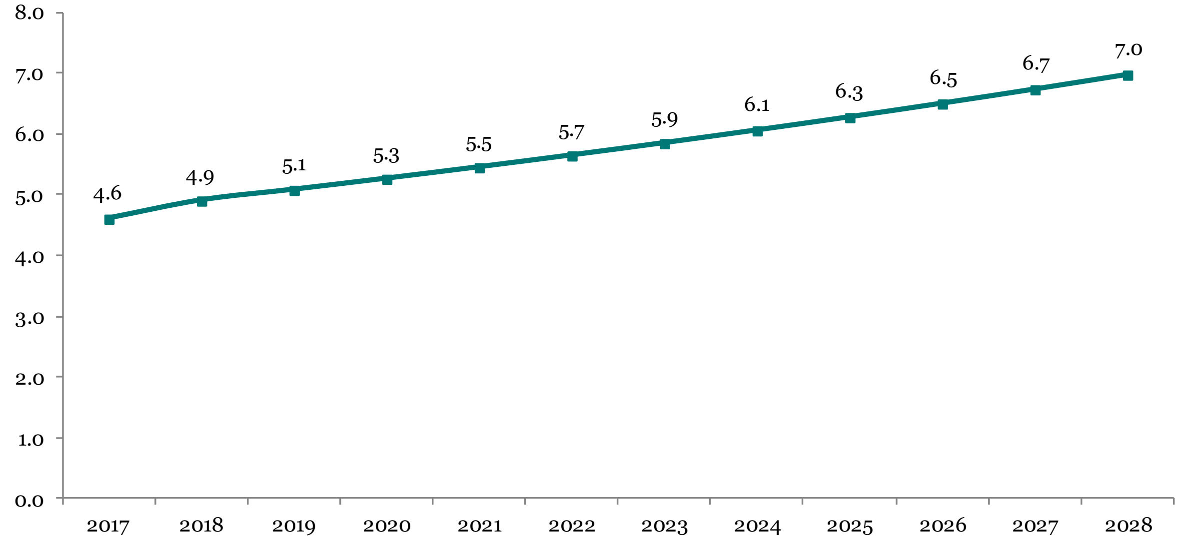
11.3 France Dermatological Drugs Market and Forecast, 2018 - 2028

The France dermatology market, in 2018, is the 3rd largest global Dermatology market.

Figure 1 France Dermatology Market and Forecast, 2018 – 2028 ($ bn)



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