



## Content highlights

### Release date

November 2024

Updated throughout the year to reflect Clarivate's expert analysis of the latest major-market events

### Geography

United States, EU5, Japan

### Primary research

Approximately 20 country-specific interviews with thought-leading neurologists

Supported by survey data collected for this and other Clarivate research

### Epidemiology

Total, diagnosed, and drug-treated prevalent cases of AD by country and severity of dementia; diagnosed prevalence of comorbid depression, agitation, and psychosis

### Forecast

10-year, annualized, drug-level sales and patient share of key AD therapies through 2033, segmented by brands / generics and mild cognitive impairment (MCI) due to AD, mild AD, moderate AD, and severe AD

### Drug treatments

Coverage of key current and emerging therapies

# Alzheimer's Disease

## Spotlight on Disease Landscape & Forecast

### Market outlook

Eisai / Biogen's lecanemab (Leqembi) has launched for the treatment of early Alzheimer's disease (AD) in the United States and Japan and is under review with European regulators. Early uptake has been slower than expected, but it is accelerating as market-building efforts increase awareness and aim to overcome logistic hurdles. We expect Eli Lilly's donanemab to launch in 2024, setting the stage for intense competition as both MABs endeavor to realize the unfulfilled potential of a disease-modifying therapy (DMT) for early AD. Other DMTs may soon follow in the United States and potentially other markets (e.g., Eisai / Biogen's subcutaneous lecanemab, Eli Lilly's remternetug, Novo Nordisk's semaglutide). Meanwhile, Lundbeck / Otsuka's Rexulti has become the first FDA-approved option to treat agitation in AD. Other novel therapies (Axsome's Auvelity, Karuna's KarXT) are progressing through late-phase development to treat the neuropsychiatric symptoms of AD. The launch of these potential blockbusters could meaningfully alter the dynamics of this market, driven by clear need, strong market demand, and premium pricing.

### Questions answered

- How will competition between anti-beta-amyloid (anti-A $\beta$ ) MABs evolve in the AD market through 2033?
- What do KOLs think of recently approved therapies (e.g., Otsuka / Lundbeck's Rexulti) as well as key symptomatic therapies and DMTs in development for AD?
- What is the likely level of uptake for Axsome's Auvelity and Karuna's KarXT if they launch for AD agitation and psychosis, respectively?
- What are the drivers of and constraints on the AD market, and how might they change over the forecast period as premium-priced agents enter the market?

### Product description

Disease Landscape & Forecast provides comprehensive market intelligence with world-class epidemiology, keen insight into current and emerging therapies, and drug forecasts supported by detailed primary and secondary research.

### Key features

Disease Landscape & Forecast will be updated throughout the year to provide timely insights and analyses as material indication-specific news and events unfold.

Disease Landscape & Forecast features a Drug Pipeline chapter with real-time, global pipeline intelligence content directly from Cortellis. This chapter is updated daily and features interactive figures that can be easily downloaded for detailed analysis or presentations.

## Learn more about Clarivate's full suite of Alzheimer's disease solutions:

[healthcare.support@clarivate.com](mailto:healthcare.support@clarivate.com) | [clarivate.com](https://clarivate.com)