



Sample content

Heart Failure

Disease Landscape & Forecast

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About Disease Landscape & Forecast

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.



What are the sizes of the diagnosed, drug-treatable, and/or drug-treated populations?



What is the current treatment landscape?



What products are in development, and what is their launch potential and future positioning?



What is the market outlook of sales and patient share for the next 10 years?



What are the drivers and constraints of market growth, and what events will most impact the market's trajectory?



What unmet needs and opportunities exist?

Methodology and scope

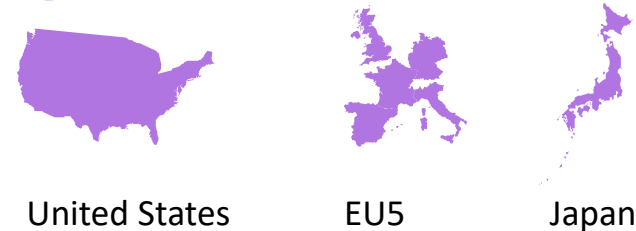
Market forecast

- **Forecast:** Annualized drug-level sales and patient share of key heart failure therapies from 2023-2033, segmented by brands/generics.
- **Epidemiology:** Diagnosed and drug-treated cases of acute heart failure events and prevalent cases of heart failure, by country.
- **Market segmentations:** Acute heart failure (AHF), heart failure with reduced ejection fraction (HFrEF), and heart failure with preserved ejection fraction (HFpEF).
- **Additional content:** Downloadable Excel files containing detailed forecast assumptions and visual outputs.

Primary market research

- Interviews with 27 thought-leading cardiologists across the G7.
- Data and insights leveraged from numerous physician surveys conducted by Clarivate in heart failure to model current and future market dynamics.

Geography

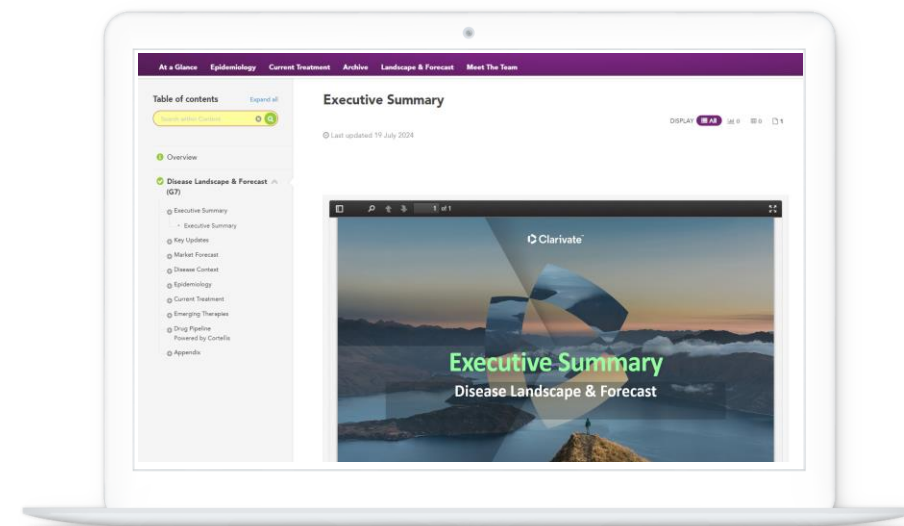


Key therapies covered





Phase 3 / pre-registered	<ul style="list-style-type: none">• Finerenone (Bayer)• Tirzepatide (Eli Lilly)• Semaglutide (Novo Nordisk)• Ziltivekimab (Novo Nordisk)• Vicadrostat (Boehringer Ingelheim)• Balcinrenone / dapagliflozin FDC (AstraZeneca)
Marketed	<ul style="list-style-type: none">• Entresto (Novartis)• Farxiga / Forxiga (AstraZeneca)• Jardiance (Eli Lilly / Boehringer Ingelheim)• Inpefa (Lexicon Pharma)• Verquvo (Merck & Co. / Bayer)

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Report format

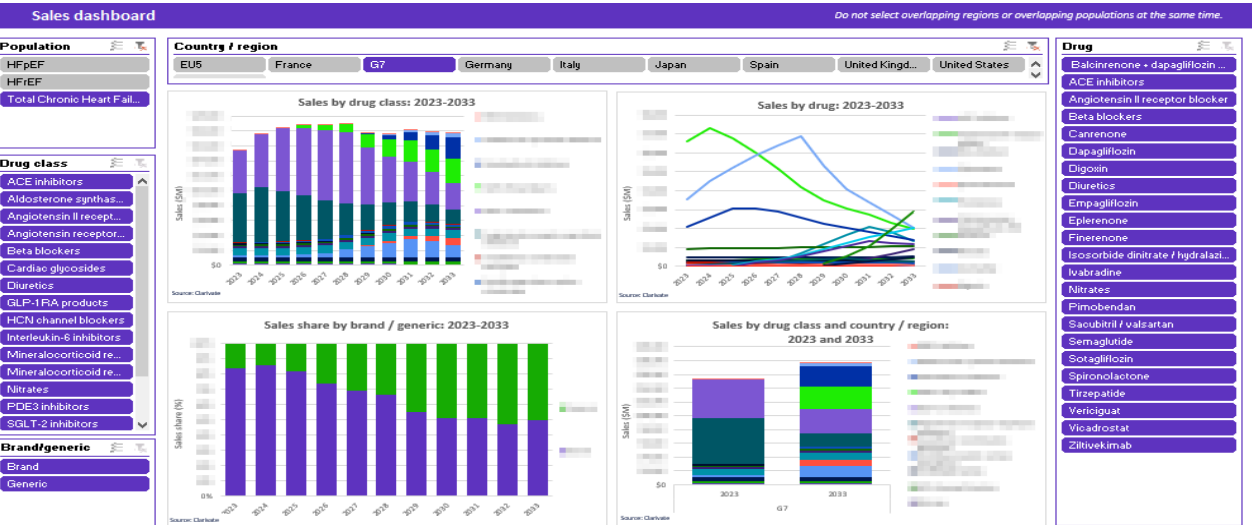
-  **In-depth written analyses** available on Clarivate's Insights Platform or as a PDF download
-  Succinct **Executive Summary** deck
-  **Market Forecast Assumptions** (flat data file providing comprehensive view of the 10-year, annualized, patient-based market forecast assumptions, including a detailed methodology)
-  **Market Forecast Dashboard** (interactive tool to help understand, interpret, explore, and visualize key outputs from the market forecast)

Sample content

Question answered

What are the expected sales of key drugs used to treat chronic heart failure in the G7 markets over the next 10 years?

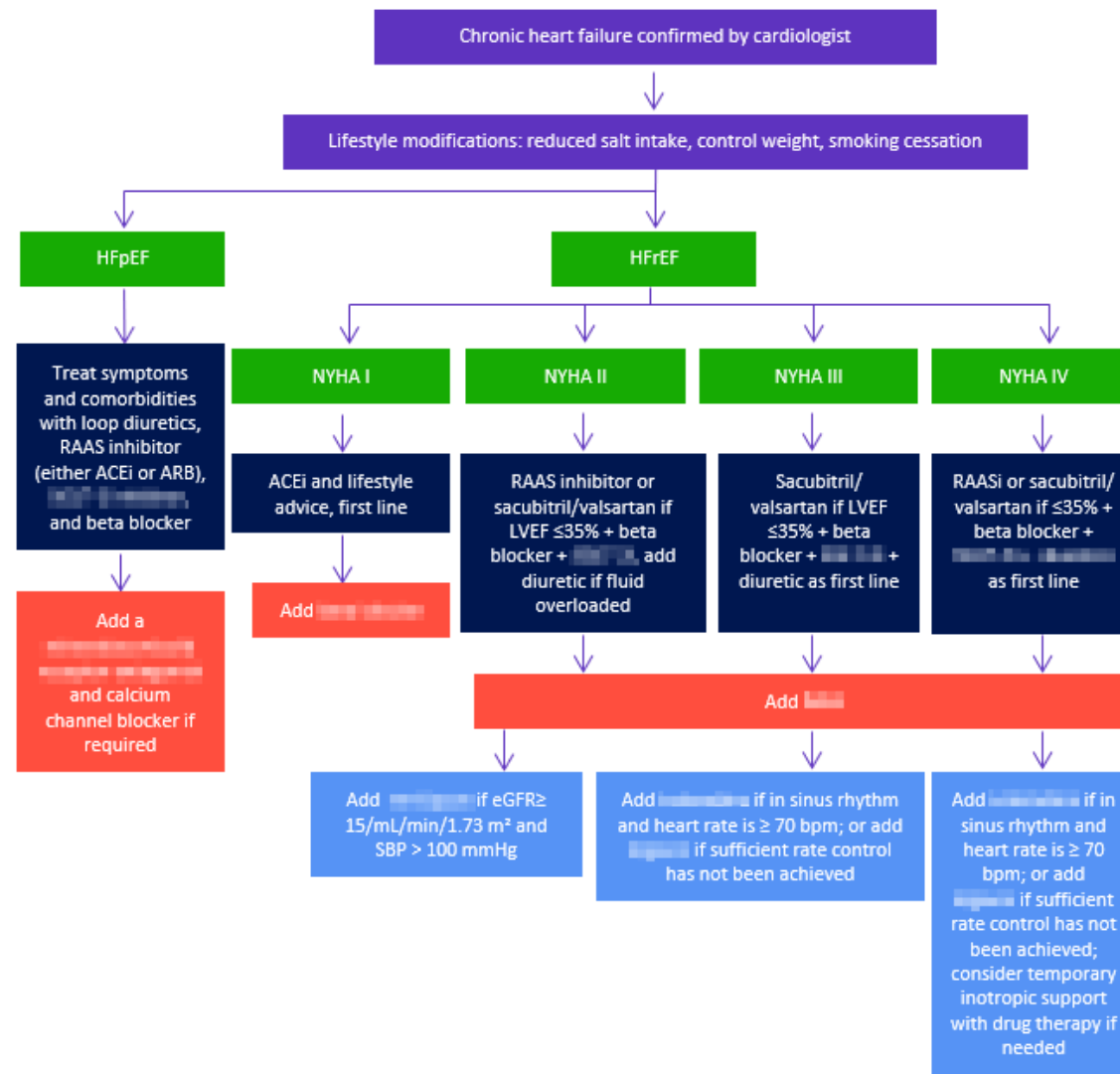
Sales (\$M)											
Total Chronic Heart Failure											
	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
ACE inhibitors											
ACE inhibitors	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
ACE inhibitors	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
ACE inhibitors	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
Angiotensin II receptor blocker											
Angiotensin II receptor blocker	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
Angiotensin II receptor blocker	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
Angiotensin II receptor blocker	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
Beta blockers											
Beta blockers	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
Beta blockers	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
Beta blockers	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
Mineralocorticoid receptor antagonists											
Canrenone	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
Canrenone	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
Canrenone	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
Eplerenone	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00



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Question answered

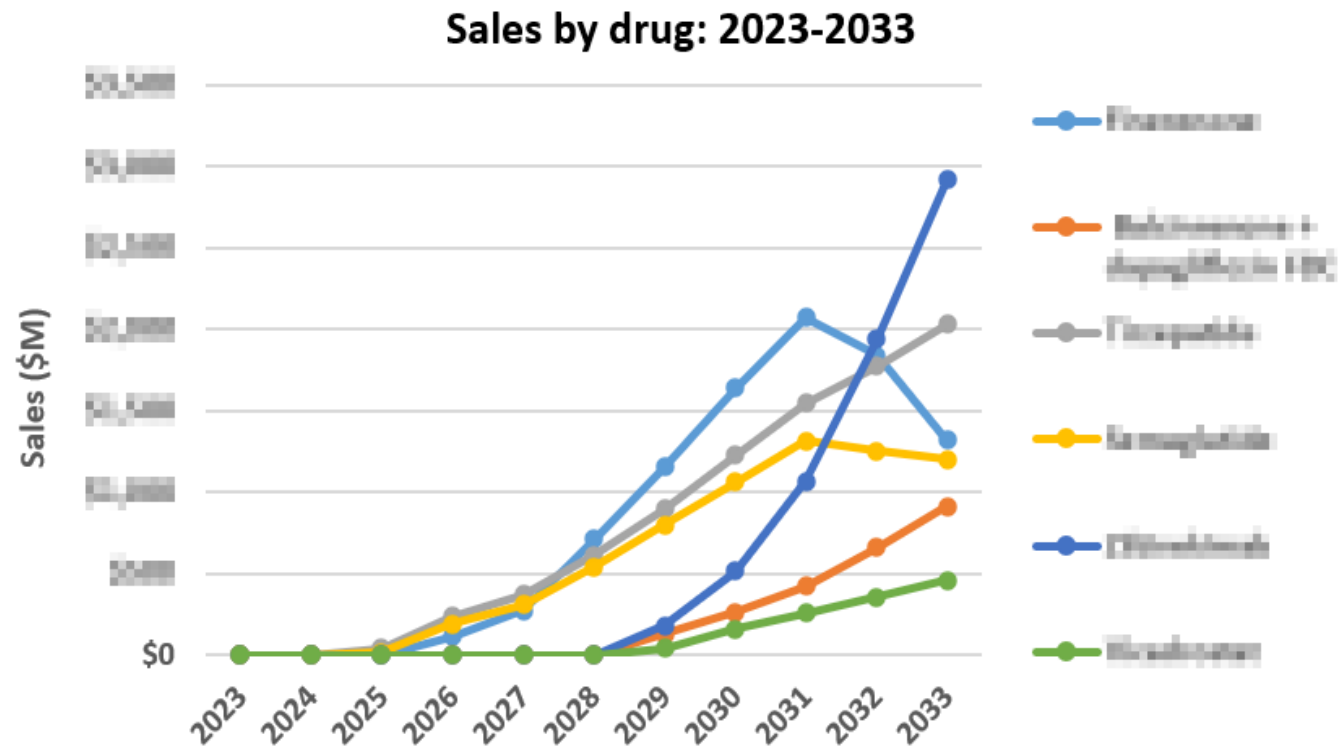
What is the current treatment paradigm in heart failure?



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Question answered

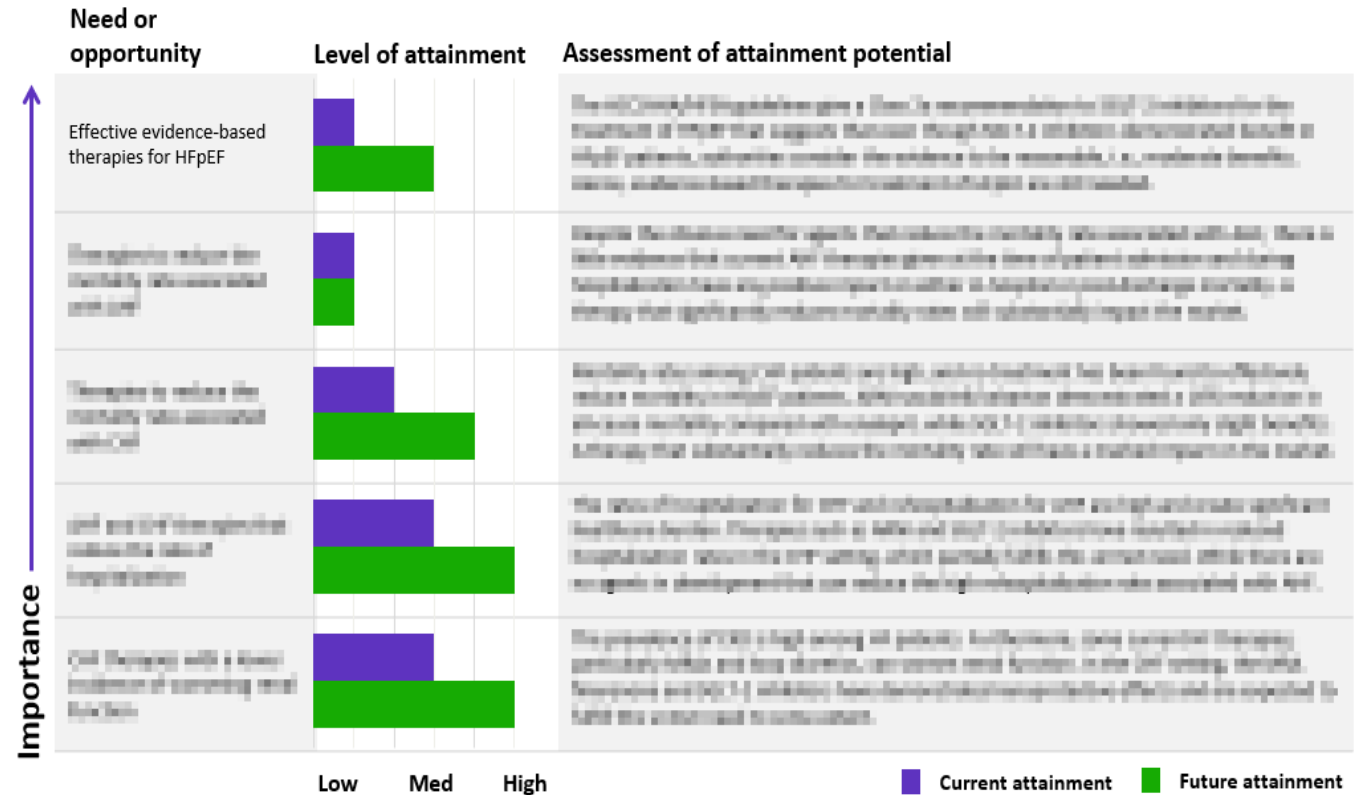
What are the expected sales of emerging therapies in the G7 markets over the next 10 years?



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Question answered

What clinical unmet needs remain unfulfilled and represent the top opportunities for drug developers?

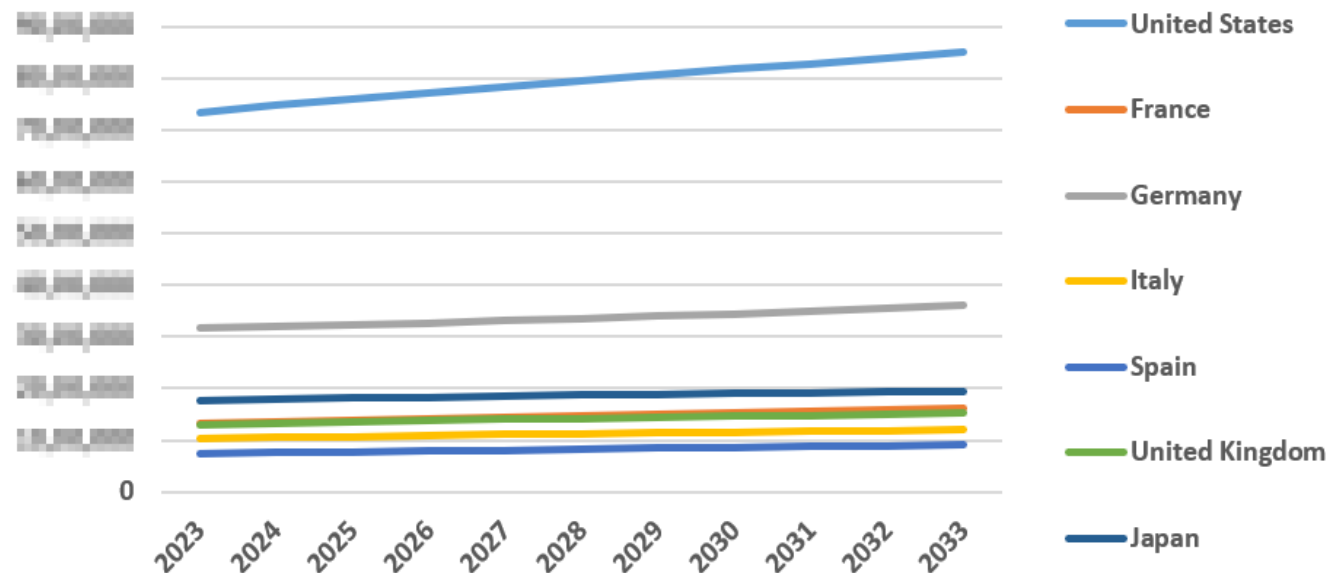


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Question answered

What is the expected number of total diagnosed prevalent cases of heart failure in the G7 over the next 10 years?

Diagnosed patients, by country / region: 2023-2033



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Question answered

How do leaders in the field of heart failure management rate key emerging therapies?

Clinical practice

"GLP-1 RAs are upstream of heart failure. We're treating a ton of our HFrEF patients with GLP-1s with great success, reversing a lot of HFrEF by treating the obesity and the diabetes. They don't have any specific effects on hemodynamics of the heart beyond what they're doing for risk factors. So, I necessarily don't consider them a heart failure drug, but I'll use them whenever I can in HFrEF patients." — Cardiologist, United States

"I'm quite excited because many patients have struggled with weight issues and breathlessness. They can't get strong enough to mobilize and lose the weight. This is where we think this will be very helpful and game changing. Not only does it help with heart failure, but it also aids in weight loss and mobilization, which significantly improves patients' quality of life." — Cardiologist, United Kingdom

Overall opinion

"The GLP-1s are very positive treatments for HFrEF. We have good data supporting their use even in non-obese patients. However, I don't think they will be as useful in HFxHF as we already have a lot of treatments for HFxHF." — Cardiologist, United States

"One of the ways they work is by curbing your appetite. The weight goes down, but the patients I've seen in my clinic don't feel so hot. They're happy with the weight loss, but they don't feel great, so it's not a drug that fits right into heart failure groups." — Cardiologist, United States



About Clarivate

Disease Intelligence and Analytics

Disease intelligence you can trust



Size your market

Understand global and local markets, by gauging the size of the drug treatable population, where they're located, and how populations will change over time.



Identify unmet needs

Identify areas of unmet need and direct your clinical development strategy to the areas with the greatest opportunity.



Fuel successful market access

Optimize your market access strategy with brand-level insight regarding the impact of payer policy on physician prescribing behavior.



Assess and prioritize opportunities

Evaluate market potential for your assets – and those of your competitors – and optimize your strategy with indication-specific market intelligence combined with world-class epidemiology.



Understand the patient journey

Gain visibility into brand usage by line of therapy with RWD and uncover the 'why' behind treatment pathways and brand usage with in-depth coverage of physician perceptions on disease management.



Optimize your brand positioning

Analyze treatment pathways across highly dynamic oncology indications to support brand positioning, strategic planning, and business development.

Find out more

Learn more about how Clarivate can help you maximize your market share:

clarivate.com/products/biopharma/portfolio-strategy-business-development



Contact our experts today:
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clarivate.com

About Clarivate

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