

Sample content

Multiple Sclerosis

Disease Landscape & Forecast

Published: October 2024

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

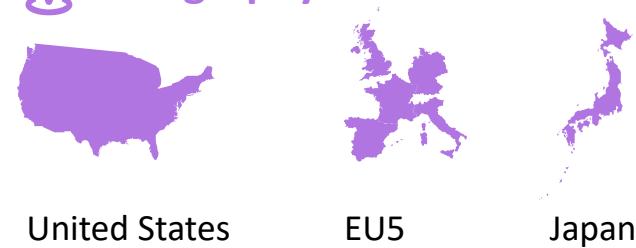
Market forecast

- **Forecast:** Annualized drug-level sales and patient share of key multiple sclerosis therapies from 2023-2033, segmented by brands/generics.
- **Epidemiology:** Diagnosed and drug-treated prevalent cases of multiple sclerosis by country and subpopulation (CIS, RR-MS, SP-MS, PP-MS).
- **Market segmentations:** CIS, RR-MS, SP-MS, PP-MS
- **Additional content:** Downloadable Excel files containing detailed forecast assumptions and visual outputs.

Primary market research

- Interviews with 31 thought-leading neurologists across the G7.
- Data and insights leveraged from physician surveys conducted by Clarivate in multiple sclerosis to model current and future market dynamics.

Geography

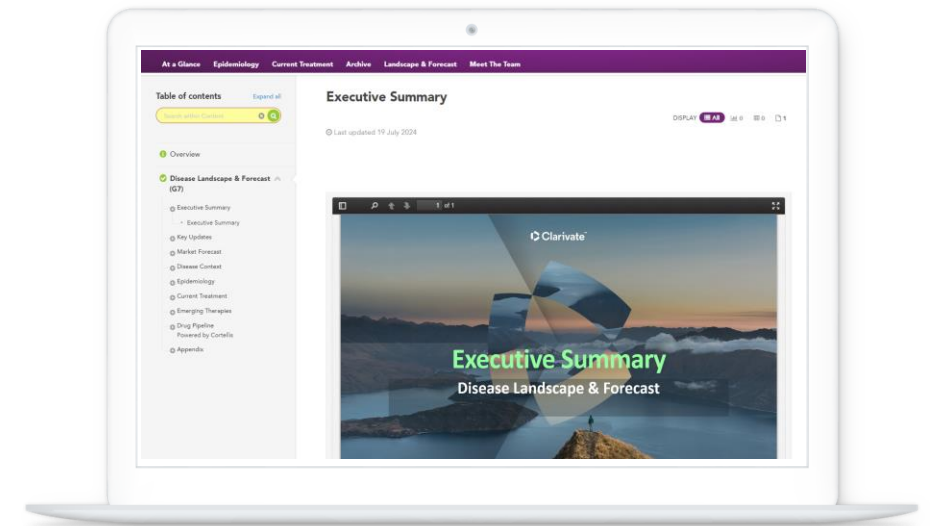


Key therapies covered

Phase 2	<ul style="list-style-type: none">• Orelabrutinib• BIIB091• Oditrasertib• KYV-101• CNM-Au8
Phase 3	<ul style="list-style-type: none">• Tolebrutinib• Fenebrutinib• Remibrutinib• Frexalimab• GA Depot• IMU-838• Masitinib
Marketed	<ul style="list-style-type: none">• Ocrelizumab (Ocrevus)• Ofatumumab (Kesimpta)• Ublituximab (Briumvi)• Natalizumab (Tysabri)• Oral cladribine (Mavenclad)• Siponimod (Mayzent)• Ozanimod (Zeposia)• Ponesimod (Ponvory)• Diroximel fumarate (Vumerity)

Report table of contents

1. **Executive Summary**
2. **Key Updates**
3. **Market Forecast**
 - Key takeaways
 - Market drivers and constraints
 - Drug class-specific trends
4. **Disease Context**
5. **Epidemiology**
 - Key takeaways
 - Total diagnosed prevalent cases of multiple sclerosis
 - Subpopulations
 - Diagnosed and drug-treated populations
6. **Current Treatment**
 - Key takeaways
 - Treatment for multiple sclerosis
 - Key current therapies
7. **Emerging Therapies**
 - Key takeaways
 - Key emerging therapies
 - Unmet need in multiple sclerosis
8. **Drug Pipeline** (powered by Cortellis)
9. **Appendix**



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

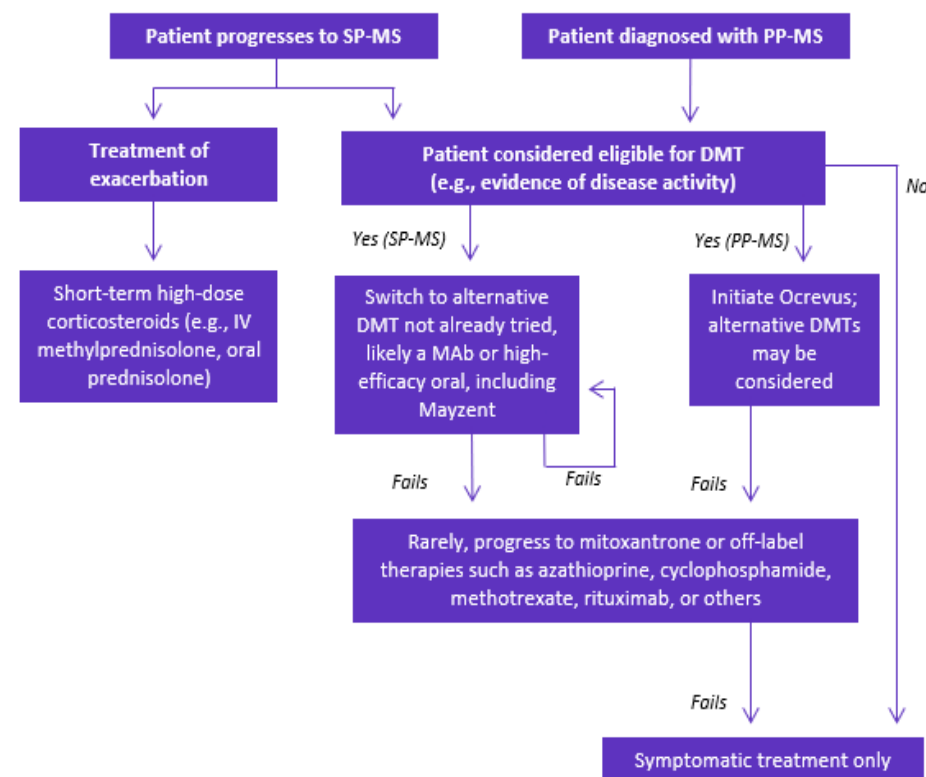
What are the expected sales of key drugs used to treat multiple sclerosis in the G7 markets over the next 10 years?



Sample content

Question answered

What is the current treatment paradigm in multiple sclerosis, and how are agents positioned in the treatment algorithm?



Sample content

Question answered

When are the key novel therapies expected to launch for the multiple sclerosis market over the next 10 years?

Forecast launch dates of key emerging therapies for the treatment of MS: 2023-2033

Drug	United States	France	Germany	Italy	Spain	United Kingdom	Japan
Vumerity	2023	2023	2023	2023	2023	2023	2023
Briumvi	2023	2023	2023	2023	2023	2023	2023
GA Depot	2023	2023	2023	2023	2023	2023	2023
...
...
...
...
...
...
...

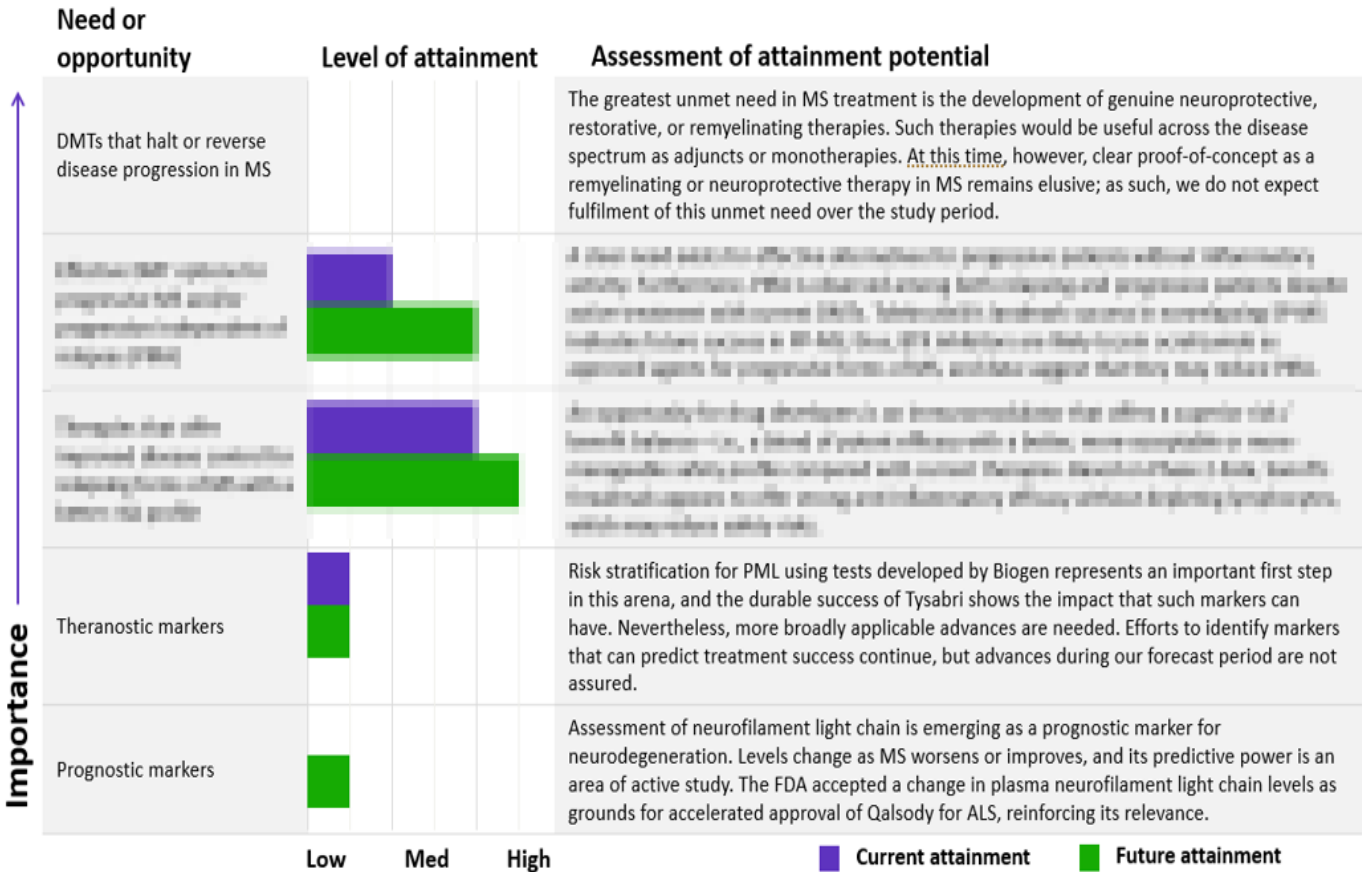
Note: Launch dates for emerging therapies are estimated based on an analysis of the product’s current phase and status of development, development timelines for the disease, region-specific regulatory timelines, and company reports. Launch dates reflect potential pricing and reimbursement delays in the individual markets.

Source: Clarivate

Sample content

Question answered

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



Sample content

Question answered

How will the launch of novel BTK inhibitors impact treatment dynamics in the major markets?

Perception of clinical profile

"Based on the Phase 2 trial, fenebrutinib's data are not too bad. It seems a bit better than the other BTKi's in development, but with respect to efficacy, of course, it's not close to the anti-CD20 MAbs. From all the BTKi's, if you would ask me to bet on one of them, I would rather bet on fenebrutinib succeeding in MS." —Neurologist, Germany

"I have a very strong interest in the PP-MS trial. The data that will come from the trial comparing ocrelizumab and fenebrutinib could be very intriguing, even more so than the relapsing trial in MS." —Neurologist, Italy

"I think fenebrutinib is a very promising molecule. It has a very good safety profile and it seems to have a good efficacy profile. I think it could be useful as an induction therapy in the future. We need something acting in the periphery of the brain lesions. BTK might, but I'm not sure if they are efficacious enough." —Neurologist, Italy

"I don't know where to position fenebrutinib in the class. I think it could be useful as an induction therapy in the future. We need something acting in the periphery of the brain lesions. BTK might, but I'm not sure if they are efficacious enough." —Neurologist, Italy

"The impressive Phase 2 data from fenebrutinib show a complete suppression of focal inflammation in RR-MS, which is, of course, great and bodes well moving forward." —Neurologist, France

"I think fenebrutinib is a very promising molecule. It has a very good safety profile and it seems to have a good efficacy profile. I think it could be useful as an induction therapy in the future. We need something acting in the periphery of the brain lesions. BTK might, but I'm not sure if they are efficacious enough." —Neurologist, Italy

Potential class effect due to liver toxicity

"I think fenebrutinib is a very promising molecule. It has a very good safety profile and it seems to have a good efficacy profile. I think it could be useful as an induction therapy in the future. We need something acting in the periphery of the brain lesions. BTK might, but I'm not sure if they are efficacious enough." —Neurologist, Italy

"Multiple agents have been affected, suggesting that this issue is a class effect. I need to see more Phase 3 data but, in general, I'm used to monitoring liver function in our patients. I don't think that this will necessarily be a big deal." —Neurologist, 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



Think forward™

Contact our experts today:
healthcare.support@clarivate.com
clarivate.com

About Clarivate

Clarivate™ is a leading global provider of transformative intelligence. We offer enriched data, insights & analytics, workflow solutions and expert services in the areas of Academia & Government, Intellectual Property and Life Sciences & Healthcare. For more information, please visit clarivate.com.

© 2024 Clarivate. All rights reserved

Clarivate and its logo, as well as all other trademarks used herein are trademarks of their respective owners and used under license.