

The Remaining Unmet Needs in Plaque Psoriasis: Oral Therapies

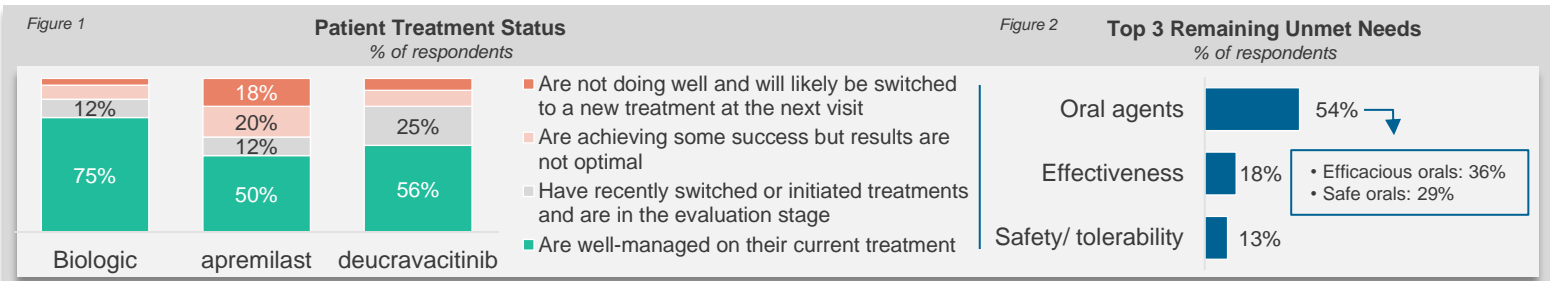
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Introduction and Objectives:

The psoriasis market has a wide range of safe and effective biologic therapies for moderate-to-severe patients. Although dermatologists report high satisfaction levels with biologics, many report an unmet need remains. This research sought to understand the remaining unmet need in plaque psoriasis and to uncover early perceptions of the oral small molecules in development for plaque psoriasis.

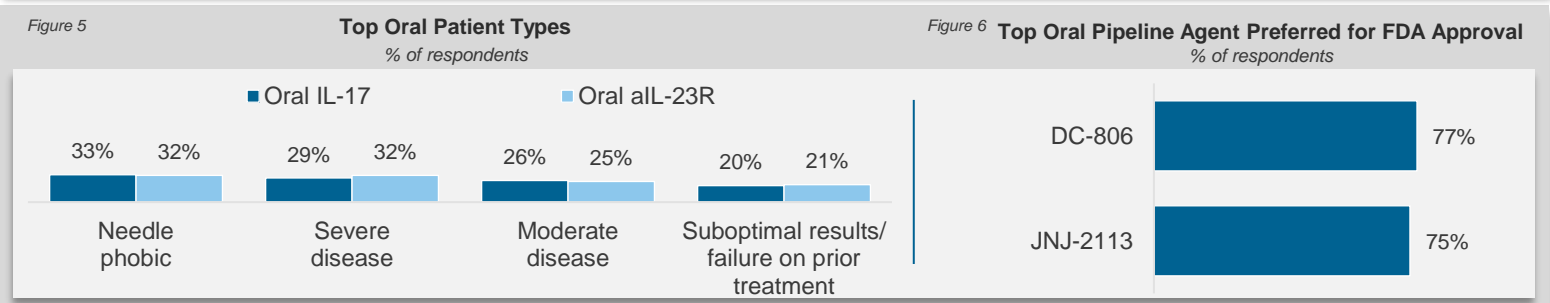
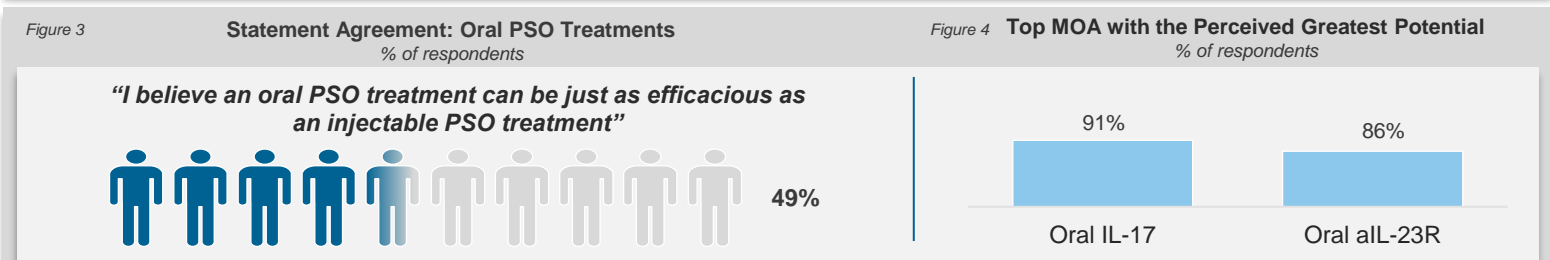
Materials and Methods:

An independent market analytics firm surveyed US community dermatologists (n=102) to collect data highlighting the remaining unmet needs and perceptions of oral small molecules in development for psoriasis.



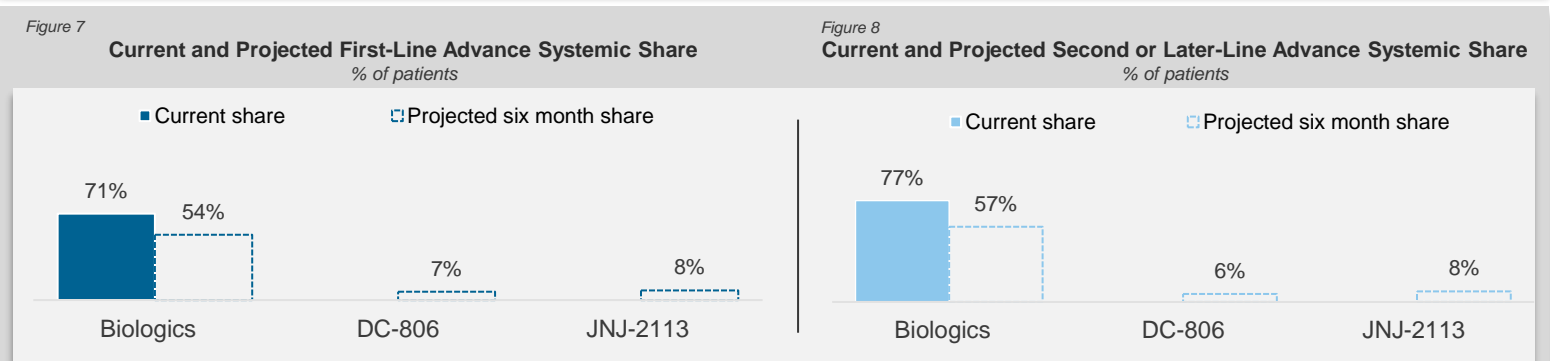
Results:

Among currently available advanced systemic options, there is a 20-25% difference in the proportion of patients receiving deucravacitinib and apremilast who are considered well-managed compared to biologics (Fig. 1). As such, more than half of dermatologists report a need for oral therapies, with 36% reporting efficacy and 29% noting safety in addition to administration (Fig. 2). Physicians further emphasize efficacy in an oral agent as 49% agree that an oral treatment can have similar efficacy to an injectable (Fig. 3). Most respondents rank the oral IL-17 (91%) and IL-23 (86%) mechanisms as having the greatest potential to treat psoriasis (Fig. 4). Patient types for these mechanisms include needle phobia, moderate and severe disease, and suboptimal results on prior treatment (Fig. 5). Thus, 77% and 75% select DC-806 and JNJ-2113 as the preferred assets to gain FDA approval (Fig. 6). Both are anticipated to capture the largest market share among oral assets and are expected to be prescribed in new (Fig. 7) and switch patients, largely at the expense of biologics (Fig. 8).



Conclusion:

Dermatologists are seeking safe and effective oral therapies and believe that oral IL-17 and IL-23 agents are better suited to meet this need compared to other oral treatments.



Acknowledgments:

Thank you to Spherix Global Insights' network of dermatologists and their patients.

Disclosures:

Spherix Global Insights is an independent market intelligence firm and has received no industry funding to conduct and report on this study.