

Global Graft-versus-Host Disease treatment market to thrive; to touch \$545 mn by 2023

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The company's latest report states that the impressive growth, which will occur across the six Major Markets (6MM) of the US, France, Germany, Spain, Italy and the UK, will be primarily driven by the rising number of allogeneic Hematopoietic Stem Cell Transplantations (HSCTs) and the increasing use of marketed and off-label biologic therapies.

However, Dr Eirini Vavatsikou, GlobalData's Senior Analyst covering Immunology, says that: "Despite the vast array of available off-label therapies - approximately 30 - for the treatment and/or prevention of GVHD, very few of these therapies have been tested in large randomized clinical trials. This has resulted in vague treatment recommendations and many patients being enrolled in institutional clinical trials.

"The only available standard of care for the treatment of acute and chronic GVHD is intravenous methylprednisolone. However, it fails to produce a complete response in more than 50% of treated patients. As a result, steroid-refractory patient subgroups face a poor prognosis, with a deteriorating quality of life.

"This problem is further compounded by the fact that second- and third-line treatments can vary from country to country across the 6MM, and also between different medical institutions within the same country."

GlobalData's report also states that Roche's Rituxan has emerged as the most clinically and commercially attractive therapy that is used in both acute GVHD (aGVHD) and chronic GVHD (cGVHD) treatment paradigms due to its growing reputation in the field.

Dr Vavatsikou continues: "Rituxan is gaining more and more ground in the cGVHD setting and GlobalData estimates will be one of the best-selling GVHD biologics by value in the US by 2023, with sales of \$41.4 million.

"Sanofi/Genzyme is another key player in the GVHD market, with EU-approved Thymoglobulin and the off-label biologic therapy, Campath/Lemtrada, which infiltrate the prophylaxis, aGVHD, and cGVHD setting.

"Additionally, Johnson & Johnson's Remicade has gained a significant share of the aGVHD patient group, as it is one of the few drugs effective in GVHD with gastrointestinal involvement."