

Game-Changing drugs from Merck Serono and TissueGene to transform future osteoarthritis market

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The osteoarthritis space will experience seismic changes over the next decade, as disease-modifying drugs are expected to launch for the first time into a market currently dominated by a host of generic pain-relieving treatments, according to an analyst with research and consulting firm GlobalData.

The late-stage development pipeline currently comprises two such drugs, namely TissueGene's Invossa and Merck Serono's sprifermin, which are expected to launch in the US in 2020 and 2021, respectively. Both drugs have shown evidence of slowing disease progression, and Invossa was also found to reduce osteoarthritis pain in trials.

Dr Lu Chen, GlobalData's Analyst covering Immunology, explains: "Without disease-modifying modalities that slow or reverse the disease progression, many osteoarthritis patients eventually require joint replacement surgeries and may become disabled. Thus, the need for disease-modifying drugs for osteoarthritis is immense, particularly considering that the condition is a leading cause of disability in developed countries.

"Despite this need, osteoarthritis can appear to be static for a long time and mild cases are largely managed by inexpensive generic drugs. In this way, therapies such as Invossa and sprifermin may experience slow adoption and be limited to use in more severe cases initially."

Following sluggish initial uptake, assuming that disease-modifying drugs overcome reimbursement barriers and fully establish their cost-effectiveness, GlobalData anticipates broader use of these therapeutics in the long term.

Dr Chen continues: "Both Invossa and sprifermin hold the potential to drastically change the osteoarthritis disease treatment paradigm and market.

"Sprifermin is likely to cost less than Invossa, and therefore experience better uptake initially. However, as Invossa is more

expensive, and has the added benefit of lowering pain as well as slowing joint deterioration, it will likely achieve US sales of over \$560 million in 2024, compared with around \$310 million for sprifermin."