

Dermatological Market

Chapter 1 Executive Summary

1.1 Dermatological Market Overview

The skin acts as a covering and a container for the body and whose main function is to prevent the loss of fluid from the underlying cells and tissues. The major skin diseases include:

- Acne
- Psoriasis
- Dermatitis
- Rosacea
- Urticaria
- Hair Loss
- Botulinum Toxin and other cosmetic treatments

Anti-aging products, such as botulinum toxin, and hair loss products are focused on the cosmetic enhancement of the effects of aging, which are not skin diseases and should be considered separately from other skin disease. Table 1.1 shows the performance of global dermatological market for acne, psoriasis, infective, botulinum toxin and other dermatological treatments from 2003 to 2006.

Table 1.1 The Sales Performance of Dermatological Markets (\$m)

	2003	Sales (\$m)		2006	GR (05/06)%	CAGR (03/06)%	MR (2006)%
		2004	2005				
Anti-Acne	xxxx	xxxx	xxxx	xxxx	xx%	xx%	xx%
Anti-Psoriasis							
Anti-Infective							
Other Derma.							
Corticosteroid							
Botulinum Toxin							
Total	_____	_____	_____	_____	_____	_____	_____

Source: visiongain, 2007

The dermatological market showed a steady increase with a xx% CAGR from 2003 to 2006. Total skin diseases revenues in 2006 were \$xx bn, which increased by xx% compared with 2005. Anti-psoriasis and botulinum toxin are the main drivers for the

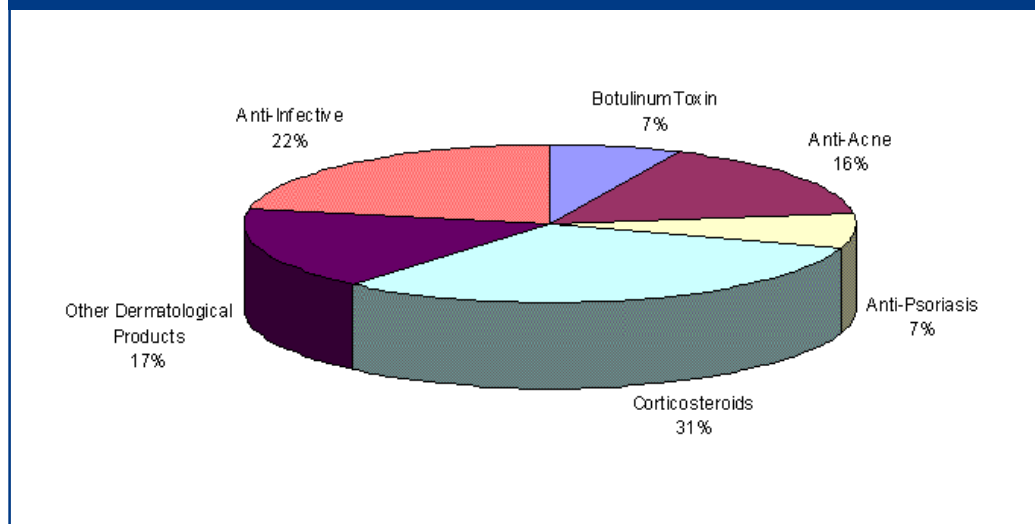
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dermatological market, which represented xx% and xx% growth (CAGR), respectively, from 2003 to 2006.

Corticosteroid agents include topical and systemic plain or combination steroids. The revenue of corticosteroid was 31% in 2006 as they are common used in multi-dermatological diseases, such as psoriasis or dermatitis.

Figure 1.1 shows the market share of dermatological treatments in 2006.

Figure 1.1 Market Share of Dermatological Market in 2006



Source: visiongain, 2007

All the dermatological treatments had positive growth in the market. Corticosteroid, anti-infective and other dermatological agents were ranked as the first, the second and the third leading treatments according to their revenues in 2006. Anti-psoriasis and botulinum did not have high market share however the growth rates were more significant compare with other dermatological treatments.

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topical therapies. Photochemotherapy is used in combination with ultra-violet A light therapy and psoralene, a compound of furocoumarins, for moderate to severe psoriasis. Oxsoresalen-ultra is the product for photochemotherapy.

4.4 Psoriasis/ Pruritus World Market Outlook

4.4.1 Current Global Psoriasis Market

Table 4.3 shows the sales performance of the global anti-psoriasis treatments market over the period 2003 to 2006.

Table 4.3 Global Anti-Psoriasis Market (\$m)

	2003	2004	2005	2006	Growth (05/06)%	CAGR (03/06)%	Market Share (06)%
Topical Antipsoriasis							
Systemic Antipsoriasis							
Total	—	—	—	—	—	—	—

Source: visiongain, 2007

The global anti-psoriasis treatment market had significant growth over the period 2003 to 2006, increasing by a CAGR of xx%. Topical antipsoriasis treatments, which generated sales of \$xx m with a xx% market share, dominated the anti-psoriasis treatment market in 2006. However, systemic anti-psoriasis treatments which are used more frequently, increased by a CAGR of xx%, with a xx% share of the global psoriasis treatment market in 2006.

Table 4.4 Leading Psoriasis Treatments in 2006

Brand	Major Company	Generic	Class
Dovonex	Leo Pharma/ Warner-Chilcott	Calcipotriene	Topical
Daivobet	Leo Pharma	calcipotriene/betamethasone	Topical
Daivonex	Leo Pharma	Calcipotriene	Topical
Zorac	Bioglan/Allergan	Tazarotene	Topical
Oxarol	Chugai	Maxacalcitol	Topical
Taclonex	Warner-Chilcott	calcipotriene/betamethasone	Topical
Neotigason	Roche	Acitretin	Systemic
Soriatane	Connetics/Stiefel	Acitretin	Systemic
Fumaderm	Fumedica	Fumaric acid esters	Systemic
Raptiva	Roche	Efalizumab	Systemic

Source: visiongain, 2007