GlobalData

London –10 November 2016 - The endometriosis market across the seven major countries of the US, France, Germany, Italy, Spain, the UK, and Japan, is set to rise from around $1.72 billion in 2015 to just over $2 billion by 2025, representing a compound annual growth rate (CAGR) of 1.7%, according to research and consulting firm GlobalData.

The company's latest report states that this modest growth will be driven by increased disease awareness and earlier diagnoses, improvements in non-invasive diagnostic methods, and, most importantly, the launch of elagolix in the US and Europe 2018.

Edit Kovalcsik, Ph.D., GlobalData's Analyst covering Cardiovascular and Metabolic Disorders, explains: "AbbVie's pipeline drug elagolix, currently in Phase III development, promises to be the first oral gonadotropin-releasing hormone (GnRH) antagonist approved for endometriosis. In terms of safety and tolerability, elagolix avoids the detrimental hypoestrogenic side effects seen with GnRH agonists such as AbbVie's Lupron and AstraZeneca's Zoladex (goserelin acetate).

"Based on their improved safety profile, GnRH antagonists like elagolix are likely to be priced at a premium over GnRH agonists such as Lupron, and therefore their sales will significantly contribute to the endometriosis market growth.

"According to key opinion leaders interviewed by GlobalData, an oral formulation will be a welcome addition to the field because it provides doctors with increased control over dosing and allows for the immediate cessation of therapy, if necessary."

GlobalData expects much greater sales of elagolix in the US than in the major European countries, due to the significantly larger annual cost of therapy (over $7,000 in the US

compared to around $1,000 across the five European markets). Elagolix will help increase the proportion of sales made by branded products for endometriosis in the US, a market that is currently dominated by cheaper, generic drugs.

In Japan, the launch of GnRH antagonist relugolix will have a minimal impact on the endometriosis market, with the drug, anticipated to launch in 2021, only contributing 2% towards drug sales in 2025. However, the Japanese market will still undergo sustained growth during the forecast period.

Kovalcsik continues: “This can be partially explained by the enduring popularity of branded drugs for the treatment of endometriosis. Mochida’s Dinagest (dienogest) in particular is the most expensive drug used to treat endometriosis in Japan, with an annual cost of nearly $3,000. GlobalData expects Dinagest to experience an increase in sales at a CAGR of 1.5% from 2015 to 2025, remaining the most profitable drug used to treat the condition in Japan.”