Atopic Dermatitis: Strategic Insights in a Rapidly Evolving Market

Charting Success in the New Era of Therapeutic Choice

Just a few years ago, treating moderate-to-severe atopic dermatitis (AD) meant working with a highly limited toolkit. Fast forward to 2025, and the advanced systemic therapeutic landscape has transformed: in the US for example, following two recent approvals since mid-2024, there are now six advanced options and four distinct mechanisms of action (MoA), up from one in 2021. For pharmaceutical commercial and insight professionals, these changes mark both immense opportunity and the need for a new, more nuanced understanding of competitive dynamics, physician decision-making, and patient influence.

Over the past year, global healthcare research agency, RxY, has closely monitored the adoption and impact of Lilly's Ebglyss (lebrikizumab) and Galderma's Nemluvio (nemolizumab) in the US market, collecting patient chart information and healthcare provider (HCP) rationale for prescribing decisions. The findings shine a light on changes to drivers and barriers affecting prescribing habits in this space.

A Market In Flux: What the Last Six Months Reveal

New data from RxY's prospective chart study – collected from over 1,500 dynamic (new and switch) AD patient visits per wave – illuminates both the strength and vulnerability of established therapies. Sanofi/Regeneron's Dupixent (dupilumab), the incumbent leader in this space, is still considered in the majority of treatment decisions but has seen its consideration rate start to decline within the last six months.

Ebglyss - the newest IL-13 inhibitor, joining Leo Pharma's Adbry (tralokinumab) in this class, experiences notable growth among the RxY sample in six months

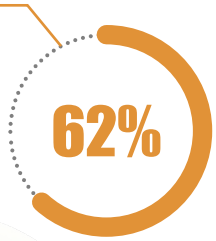
Nemluvio - the first-in-class IL-31 inhibitor offering a targeted itch mechanism, emerged with strong uptake in RxY's first study post-FDA approval

Moreover, both new treatments are on track to surpass RxY's benchmarks for first-year consideration and conversion-to-prescription rates.

Unmet Needs: The Persistent Challenge of Disease Control

Despite more treatment options, unmet need remains – underscored by data showing a steady climb in switching behavior within the advanced systemic therapy space over the past year. RxY's most recent US study records a rise in switches away from the longstanding market leader, Dupixent.

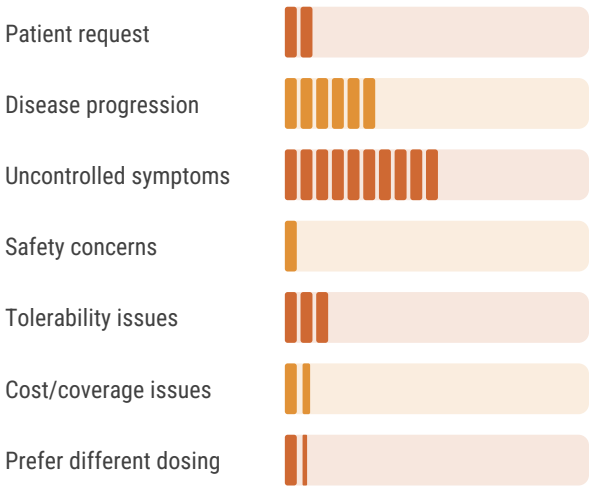
Uncontrolled disease or progression drove 62% of switch decisions



Consideration is a key step within the adoption of a product for AD treatment. Understanding the frequency of consideration across products, and the rate at which products are ultimately prescribed, are metrics often overlooked. RxY aims to fill this gap by focusing on these areas, exploring HCP rationale at each step.

Understanding the "switch drivers" – and why some patients remain inadequately controlled – has never been more critical.

Main Reasons AD Treatment Switch Needed (% of patients)



Nuance and Differentiation: The Shifting Landscape

HCP rationale for therapy choice has become more nuanced than ever before. Across all MoAs, what separates one brand – or even one mechanism – from another can often include multiple and increasingly specific factors.

What Drives Decisions Between Products?

Efficacy in controlling symptoms remains a universal expectation, but its meaning diverges by MoA. RxY data shows that the degree of product association with the most influential efficacy attributes varies by class, and is shifting over time in light of the new entrants.

Key themes of importance emerge within HCP efficacy rationale:

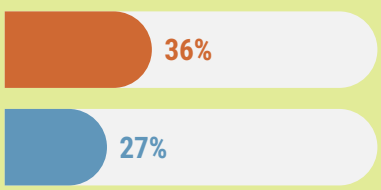
Itch Control **Skin Clearance** **Rapid Action**

Other Influential Factors

RxY data reveals trends regarding increasing HCP confidence in matching AD products to the "right" patient profile and circumstances.

- Dosing and administration preferences sway prescribing: Oral JAKi products, AbbVie's Rinvoq (Upadacitinib) and Pfizer's Cibinqo (abrocitinib) are prescribed more frequently than injected biologic products among needle-phobic patients
- Patient comorbidities and lifestyle factors are mentioned as aspects that can drive AD treatment decisions
- Perceived insurance coverage and ease of access, including administrative burden and free sample availability, underpin HCP prescribing habits

Portion of AD Patients Starting Treatment Using a Sample (% of patients)



RxY Physician Insights

"I selected Nemluvio since the patient's primary issue is itching and this medication is excellent for treating pus that is uncontrolled. It is also very safe → I'm trying to get the patient completely itch free so that he's able to sleep at night. I am hoping that his NRS score drops to 0 → It does not require lab monitoring, and it is not toxic"

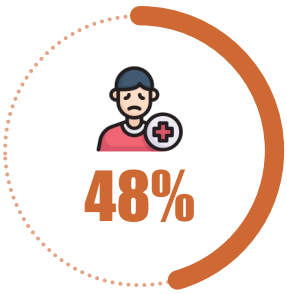
– US Dermatologist, Reason for switching to Galderma's Nemluvio from Sanofi/Regeneron's Dupixent

The Rising Influence of the Patient

With more options available, patients are playing a greater role in treatment selection, which is sometimes driven by preference for oral dosing or superior itch relief. Additionally, patients express conflicting preferences for more established versus new/novel treatment options.

In RxY's 2025 study, nearly half of prescriptions were made with the patient as the key decision maker.

Patient-Led AD Treatment Decisions (% of patients)



Patients' growing awareness and willingness to voice preferences can tip the scales in a highly competitive dialogue involving multiple treatment options

The Future of Moderate-to-Severe AD Prescribing

As the dynamic moderate-to-severe AD environment evolves, the attributes associated with treatment options will become the battleground for therapy selection. This level of distinction has the undoubted potential to boost positive outcomes for AD patients.

In an era where HCPs and patients are faced with more choice – and better-informed than ever – RxY will continue to explore and track the "Why" behind real-life treatment decisions in this increasingly competitive environment.

The Road Ahead: Key Areas of RxY Focus

- Understanding the True 'Why/Why Not' and subtle factors that influence both consideration and prescription of each AD treatment option
- Identifying where each brand is gaining traction and where HCPs 'split hairs' when making head-to-head treatment decisions
- Linking patient profile factors, including the influence of patient preferences, to prescribing behaviors for moderate-to-severe AD
- Uncovering signals of additional impending market shifts in anticipation for the entry of novel MoAs and increased competition within moderate-to-severe AD prescribing

Physician verbatim

"The patient requested Rinvoq by name as they are needle phobic and wanted an oral treatment option → The patient was afraid of needles and wanted a product that could be given orally"

– US Dermatologist, Reason for prescribing AbbVie's Rinvoq

"The patient preferred Dupixent due to long term data → The amount of available data supports Dupixent in long term control"

– US Allergist, Reason for considering a new product but prescribing Sanofi/Regeneron's Dupixent instead

About RxY

RxY is a market research firm focusing on patient chart audit collection involving large samples of chart data from patients who experience treatment changes in near-real time, with rationale for treatment decision-making.

RxY covers various therapy areas globally across dermatology, rheumatology, gastroenterology, hematology, oncology, neurology, and cardiometabolic. If you want to understand the true Why / Why Not behind consideration and prescribing of therapies please not contact us.

RxY's Atopic Dermatitis Heritage

RxY have captured circa 20,000 dynamic patient charts and 80,000 verbatims since 2022, covering the US, EU5, and Japan.

Study Design | 1,528 treatment change patient records collected from 226 HCPs | March – April 2025

Contact RxY today for the full Atopic Dermatitis analysis & more!

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