Antiviral Market to 2016: Antiretroviral Agents and Combination Therapies to be Major Drivers

HIV and Hepatitis C Markets

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An estimated 1.2 million people in the United States are living with human immunodeficiency virus (HIV). The disease has grown from being considered a death sentence in the 1980s to one that can be effectively managed with the right medication. With advances in pharmacology over the past two decades, the human immunodeficiency virus (HIV) epidemic has become manageable. The human immunodeficiency virus (HIV) epidemic has become manageable. The U.S. Centers for Disease Control and Prevention (CDC) estimates that the average lifetime cost of treating one patient with HIV is nearly $380,000, in 2016 USD.

HIV medications are now a $17 billion market

“Being seen as not on an active treatment has been because of new and innovative treatment that has been continually emerging,” saysCVS Health executive vice president, medical affairs, specialty management and pharmacy, Dr. Marygrace B. Ryan.

The HIV drug pipeline has seen dramatic shifts in recent years, as more effective medications were developed to treat the disease. As a result, new treatment regimens and formulations are continually emerging. The pillform of antiretroviral (ARV) medications, which were administered once or twice a day, is no longer the norm. For example, Symtuza (dolutegravir/lamivudine/abacavir), which was approved by the FDA last fall, is dosed once a day. Other single-tablet regimens (STRs) are also coming to market. The most recent STRs include Symtiua, Janssen Pharmaceuticals, Inc., and GlaxoSmithKline’s Odefsey.

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Preventive Drugs for HIV

In recent years, the market has seen a shift toward more expensive single-pill regimens. In 2006, Atripla was the first once-daily regimen to hit the market. Since then, a number of other STRs have been approved. Established in the 1990s, the game changer was combination highly active antiretroviral therapy (HAART), which led to a dramatic decrease in deaths from HIV/AIDS.

In 2015, Gilead Sciences, Inc. launched Genvoya, which became the most prescribed HIV drug for patients who were either unable to tolerate, or who made a decision away from, existing competitors in Genvoya and Triumeq, so is unlikely to significantly impact payors and improves outcomes for patients.

In 2016, the FDA approved Janssen Pharmaceuticals’ new drug, TAF, which is the first to target the hepatitis C virus (HCV) with a novel mechanism of action. TAF is dosed once a day, and has improved tolerability and safety compared to existing options. The PDR benchmark provides low self-pay prices and is available if a generic is approved. As of December 6, 2017, the FDA has yet to approve a generic version of Truvada; however, if a generic version is approved, payors may ask the generic manufacturer to provide equivalent copay and patient assistance.

In 2016, the FDA approved the first drug for the treatment of HIV-infected infants, ibalizumab, which targets CD4 and CD20 to reduce the frequency of opportunistic infections. The drug, which is marketed as Tralvega, is designed to target specific immune cells and reduce inflammation. In 2017, the FDA approved Symtuza, which is expected to launch in the third quarter of 2017.

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The evolution of antiretroviral agents

It is also the first-ever HIV treatment not to require daily dosing

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Trend Toward Safety, Simplicity

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The future of HIV treatments

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