



CI Insight Report - IBD 2024 -

[Sample Table of Contents]

September 2024

Social Survey Research Information Co., Ltd.

§ Report TOPICS

Diseases under investigation	IBD <Crohn's disease/ulcerative colitis>	
Survey Points/ Topics	Carogra	<ul style="list-style-type: none"> ➤ Analysis and verification of prescription status (including withdrawal and readministration status) ➤ Verification of drug evaluation ➤ Forecast of future prescribing trends <ul style="list-style-type: none"> ⇒ In-depth analysis of the latest prescription reality and drug evaluation! ⇒ In-depth forecast of future prescribing trends (including the impact of S1P entry)!
	Bio/JAK	<p><Separate analysis, verification or forecast for CD and UC for each of the following></p> <ul style="list-style-type: none"> ➤ Analysis and verification of the status of drug prescriptions in the introductory phase and key points in decision-making ➤ Analysis and verification of changes in drug prescriptions after the entry of new drugs ➤ Forecast of future prescribing trends <ul style="list-style-type: none"> ⇒ In-depth analysis of the latest prescribing realities after the entry of new drugs into the market! ⇒ In-depth forecast of future Bio/JAK and drug-specific prescribing trends!
	New drugs	<ul style="list-style-type: none"> ➤ Verification and forecast of the potential and prescribing trends of S1P (vs. Carogra) ➤ Verification of the potential of new Bio/oral drugs <ul style="list-style-type: none"> ⇒ In-depth verification of the potential of new drugs!
	Direction of paradigm shift	<p><Based on the forecast of Bio/JAK prescribing trends></p> <ul style="list-style-type: none"> ➤ <u>In-depth forecast of future treatment paradigm shifts (separate forecast for CD and UC)!</u> <p>(What about the shift from the Bio omnipresent market to the market of oral drugs such as JAK?)</p>

■ Major Survey Subjects

*Underlined and bolded items are the focus of the survey.

Disease			IBD (Crohn's disease, ulcerative colitis)	
Remedy	Existing drugs	Bio	TNF	Infliximab, Adalimumab, Simponi
			$\alpha 4\beta 7$	Entyvio
			IL-12/23	Stelara
			IL-23	<u>Skyrizi, Omvoh</u>
		JAK	-	Xeljanz, <u>Jyseleca, Rinvoq</u>
		Oral drug	$\alpha 4$ integrin	<u>Carogra</u>
	New drugs (developed drugs)	Oral drug	S1P	<u>Ozanimod, Etrasimod</u>
			TyK2	TAK-279 Zasocitinib
		Injection	IL-23	CNTO 1959 Guselkumab (Tremfya)
			TNF	CT-P13 Remsima
			IL-23/TNF	JNJ-78934804 Guselkumab/Golimumab
			TL1A	TEV-48574

§ Summary by Report Part

Survey type	Part I Data analysis	Part II Quantitative survey	Part III KOL hearing
Survey method	Data analysis (based on open source)	Web survey via the Internet	Depth interview
Physicians surveyed/ Number of physicians surveyed	-	IBD clinicians Total: 217 All Bio/JAK users	IBD TOP KOL: 3 [Board members of related academic societies]
Departments surveyed <Facility type>	-	Gastroenterology, internal medicine, gastroenterological surgery <HP/GP>	Gastroenterology/gastroenterological surgery <HP>
Survey contents	<Existing drugs> List of therapeutic agents, clinical trials, related papers <Developed drugs (domestic/overseas)> Profile, mechanism of action/characteristics, clinical trials, related literatures <Others> Trends in notable companies, information on related academic societies <Attachment> Abstracts (related papers)	<Carogra prescribing trends and drug evaluation> [Subjects: Carogra users] <ul style="list-style-type: none"> ● Current prescribing status/positioning ● Drug evaluation ● Forecast of future prescribing trends <Bio/JAK prescribing status> <ul style="list-style-type: none"> ● Prescribing status by drug ● New prescriptions by drug (in the last 6 months) ● Drug prescribing status in the introductory phase ● Forecast of Ustekinumab BS prescribing trends ● Drug prescriptions by disease <Prescribing trends of new drugs (developed drugs)> <ul style="list-style-type: none"> ● Awareness by drug ● Prescribing intention and expectation by drug 	<Carogra prescribing trends and drug evaluation> <ul style="list-style-type: none"> ● Current prescribing status/positioning ● Drug evaluation ● Forecast of future prescribing trends* <Bio/JAK prescribing status> <ul style="list-style-type: none"> ● Drug prescribing status in the introductory phase ● New drug prescriptions <New drug evaluation and prescribing trend forecast> <ul style="list-style-type: none"> ● Drug-specific potential analysis ● Prescribing trend forecast by drug <Forecast of future Bio/JAK prescribing trends> <ul style="list-style-type: none"> ● Forecast of Bio/JAK prescribing trends* ● Forecast of drug prescribing trends in the introductory phase

§ Summary by Report Part

Survey type	Part I Data analysis	Part II Quantitative survey	Part III KOL hearing
Survey contents		<p><Forecast of future Bio/JAK prescribing trends></p> <ul style="list-style-type: none"> ● Clinically necessary drugs ● Forecast of drug prescribing trends in the introductory phase and so forth <p>*Separate analysis, verification or forecast for CD and UC for each of the above</p>	<p><Direction of clinical development></p> <ul style="list-style-type: none"> ● Requests for new drug development* and so forth <p>*Separate analysis, verification or forecast for CD and UC for each of the above</p> <p>*The verification/forecast of <u>actual situations/future trends in whole Japan</u> is included.</p>
Survey period	June - August 2024		
Style/Pages	Part I - PPT (or EXCEL), Part II & III - PPT/A4 total 300 pages (main report only, attachments not included)		
Report price	<p>Full report <3 parts> 1,900,000 yen (tax not included) *Parts sold separately on request</p> <p>*Option Row data 600,000 yen (tax not included)</p> <p>Row data + target matching 700,000 yen (tax not included)</p>		

<Part I Data Analysis Table of Contents>

Survey summary	3	III. Related company trends	77
I. Existing products	4	IV. Information on academic societies	94
I-1. Profile	5	IV-1. The Japanese Society of Gastroenterology	95
I-2. Mechanism of action/characteristics	15	IV-2. Japanese Society for Inflammatory Bowel Disease	101
I-3. Drug price	30	IV-3. Japan Digestive Disease Week	106
I-4. Sales transition	41	IV-4. GI Week	113
I-5. Clinical trials (UMIN)	43	V. Related literatures	117
I-6. Clinical trials (jRCT)	48	V-1. Existing products (by product)	118
II. Developed products	54	V-2. Existing products (multiple)	126
II -1. Profile	55		
II -2. Mechanism of action/characteristics	62		
II -3. Clinical trials (jRCT)	68		

<Part II Quantitative Survey **Summary** Table of Contents>

Survey summary	3
Respondent profile	4
§.Executive summary	5
§.Summary	13
1) Status of medical treatment	14
2) Carogra prescribing status (Carogra prescribing physicians)	24
3) Biologics/JAK inhibitors prescribing status and drug evaluation	31
4) Ustekinumab BS prescribing trends	55
5) Awareness and prescribing trends of developed drugs	61
6) Forecast of prescribing trends of biological agents/JAK inhibitors	75
◆ Separate analysis, verification or forecast for Crohn's disease and ulcerative colitis for all questions except 2)	

<Part II Quantitative Survey Results Table of Contents>

Survey summary	3
Respondent profile	4
§ Survey results	5
1) Status of medical treatment	6
1-1. Number of patients treated	7
1-2. Drug therapy implementation status/ Percentage of patients by severity of illness	8
1-3. Prescription status by drug type	9
2) Carogra prescribing status (Carogra prescribing physicians)	21
2-1. Total number of patients prescribed	22
2-2. Prescription status by prescription period	23
2-3. Induction of remission/re-administration and induction status	24
2-4. Switching status by drug type	25
2-5. Satisfaction level by item	26
2-6. Intention to prescribe Carogra in the future	29

*Separate analysis, verification or forecast for Crohn's disease
and ulcerative colitis for all questions except 2)

3) Biologics/JAK inhibitors prescribing status and drug evaluation	31
3-1. Prescription drugs in clinical practice	32
3-2. Prescription status by drug	34
3-3. Prescription status by prescription stage	44
3-4. New prescriptions (in the last 6 months)	45
3-5. New prescriptions by drug	46
3-6. Important details when deciding on a drug in the introductory phase	52
3-7. Drug prescribing status in the introductory phase	54
3-8. Drug evaluation	57
4) Ustekinumab BS prescribing trends	71
4-1. Intention to prescribe Ustekinumab BS	72
4-2. Points of expectation/points of concern	74
4-3. Prescribing targets and patterns in clinical practice	76
5) Awareness and prescribing trends of developed drugs	79
5-1. Awareness by drug	80
5-2. Intention for prescription by drug	83
5-3. Clinical prescribing patterns	88
5-4. Degree of influence on other drugs (drugs with decreased number of prescriptions)	91
6) Forecast of prescribing trends of Biologics/JAK inhibitors	100

<Part III KOL Hearings Table of Contents>

Survey summary	3
Summary	6
1. Carogra prescribing trends and product evaluation	19
2. Bio/JAK prescribing status	26
3. Status of new Bio/JAK prescriptions	30
4. New drug (developed drug) potential analysis	34
5. Forecast of drug selection trends	39
6. Direction of clinical development	44