

Icotrokinra

The anatomy of a Drug to Watch

Key evaluation criteria in chronic inflammatory conditions and how icotrokinra was selected as a Drug to Watch 2026

Clarivate analysts rely on actionable data and market intelligence from our suite of products to identify each year's Drugs to Watch — the blockbusters and treatment paradigm-shifters.

Identifying the paradigm shifters for chronic inflammatory conditions

This increasingly competitive market sits at the intersection of high-value biologics, greater biomarker-driven stratification and expanding indications across overlapping pathways, enabling premium pricing and lifecycle extension strategies. To identify the drugs to evaluate, the first step is translating the evidence base into a clear view of which drugs are likely to launch and succeed within the Drugs to Watch target timeframe.

Mapping the therapy landscape: Cortellis Competitive Intelligence

Our analysts gain a broad view of the status and potential success of drugs for chronic inflammatory conditions using Cortellis Competitive Intelligence, which:

- Covers the entire development lifecycle
- Provides clinical, deals, regulatory and patent intelligence for each drug and company
- Predicts the likelihood and timing of drug launches with the Drug Timeline & Success Rates statistical modeling methodology and ML-based predictive analytics



By reviewing the therapeutic landscape, Clarivate analysts narrow the field to a short list of assets that warrant deeper investigation as Drugs to Watch. In plaque psoriasis, these included multiple clinical- and commercial-stage assets targeting diverse disease pathways, such as icotrokinra (Johnson & Johnson), that are driving a shift from injectable biologics toward more convenient, high-efficacy oral therapies.

Figure 1: Assets in development for chronic inflammatory conditions, sorted by forecasted 2031 sales in Cortellis Competitive Intelligence.

Drug Name	Highest Status	Active Companies	Active Indications	Total Forecast Sales (USD M)	Regulatory Designations
sonelokimab	Phase 3 Clinical	MoonLake Immunotherapeu... MoonLake Immunotherapeu...	Hidradenitis suppurativa Psoriatic arthritis ...	2025: 0.00 2026: 0.00 ...	Paediatric Investigation Plan
lanalumab	Phase 3 Clinical	Novartis AG (Switzerland)	Autoimmune hemolytic ane... Autoimmune hepatitis ...	2025: No data 2026: 0.00 ...	Breakthrough Therapy Fast Track ...
brovoclimb	Phase 3 Clinical	Pfizer Inc (US) Priovant Therapeutics Inc (US)	Dermatomyositis Intermedate uveitis ...	2025: 0.00 2026: 0.00 ...	Fast Track Orphan Drug

Icetrokinra

Biologic-level efficacy with oral convenience

Cortellis Competitive Intelligence

Highlights icotrokinra's first-line positioning via oral convenience and superior efficacy against its competitors, with a 3-5-year competitive window in the oral IL-23 space.

- Only IL-23 receptor antagonist (targeted peptide) advancing through phase 3
- 57% PASI-90 vs 34% with SOTYKTU® (deucravacitinib; TYK2 inhibitor) in the ADVANCE-2 trial
- 6+ competing IL-23 inhibitors (injectables and oral agents) mapped by mechanism, dosing and market timeline

[Learn more](#)

DRG Fusion (Real-World Evidence & Market Access)

Demonstrates that icotrokinra has payer-favorable economics through its daily oral convenience plus reduced healthcare utilization, with its real-world adherence advantage supporting premium pricing.

- 85-95% payer coverage expected if efficacy is similar to that of injectables
- Estimated ~\$2k-5k in avoided disease management costs per patient per year due to reduced dermatology visits and prevented hospitalizations
- Predicted 75-85% 12-month continuation with oral once-daily (vs 60-70% for injectables)

[Learn more](#)

Disease Landscape & Forecast

Shows that icotrokinra is positioned well to capture the early-treatment, biologic-naïve population and its multi-indication potential contributes to its blockbuster sales forecast without market cannibalization.

- \$1.5bn expected sales for plaque psoriasis alone in the G7 markets in 2031
- IL-23 inhibitor market share estimated to be \$12.8bn by 2034, making it the leading class in an overall plaque psoriasis market forecast at \$27.5bn
- Expected to become the most prescribed oral therapy for moderate-to-severe plaque psoriasis by 2034

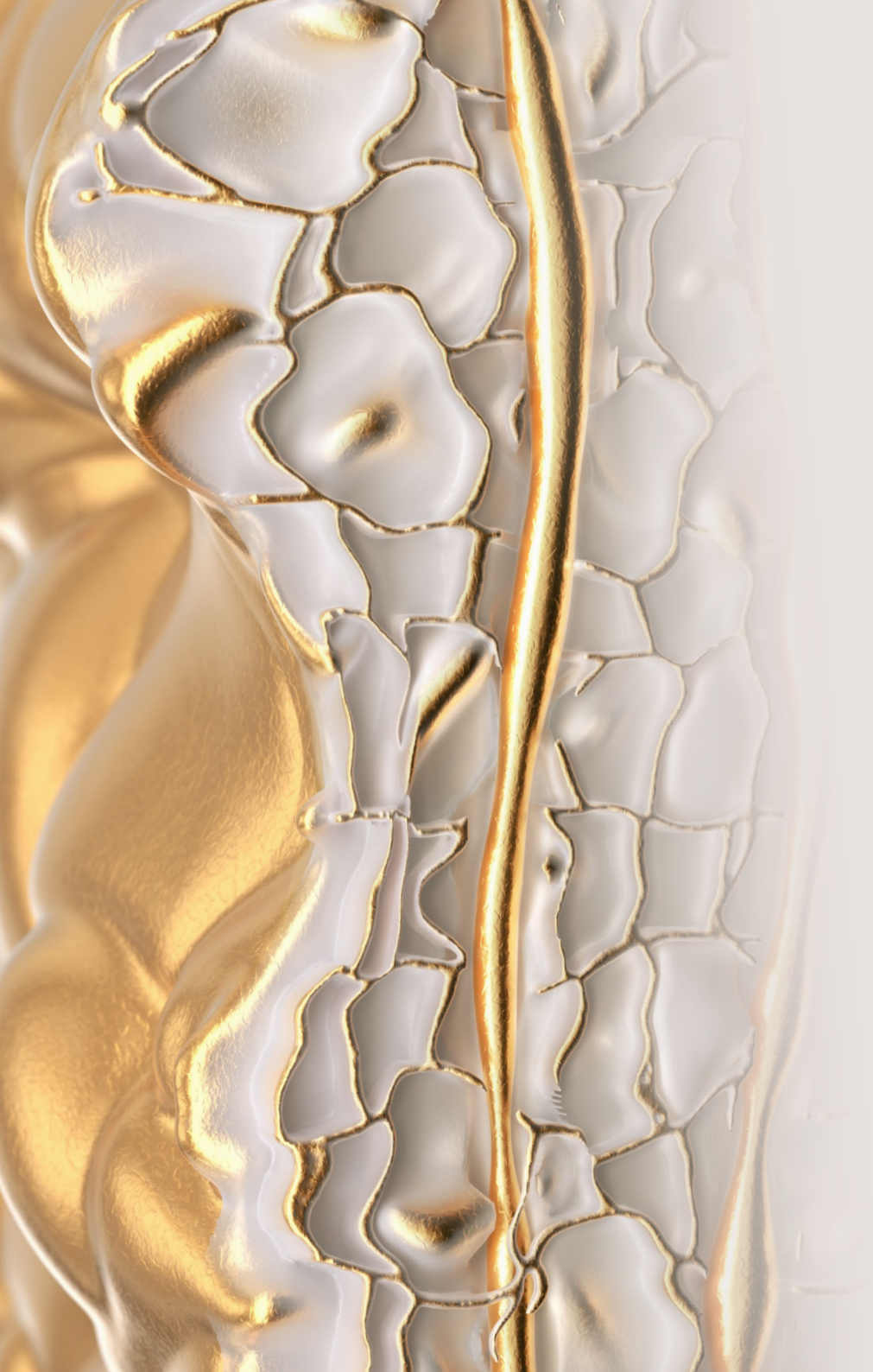
[Learn more](#)

Epidemiology Intelligence

Identifies how icotrokinra benefits from its potential to address multiple IL-23-mediated diseases including plaque psoriasis, psoriatic arthritis and ulcerative colitis, in addition to its oral convenience.

- 11.7m diagnosed prevalent cases and 5m addressable population in the moderate-to-severe plaque psoriasis subpopulation in the G7 markets in 2025
- Preference for oral over injectable drugs expressed by 40-50% of patients with plaque psoriasis
- Adoption likely to be driven by injection anxiety and treatment burden

[Learn more](#)



Summary of impact

Icetrokinra

Icetrokinra could redefine psoriasis treatment algorithms. Superior efficacy, a landmark oral-to-biologic comparison in ICONIC-ASCEND and once-daily oral dosing address the key limitations of injectable care, positioning icetrokinra for first-line adoption, expanded patient reach and durable share in the IL-23 market.

Ready to see if your drug is one to watch?

Contact us to learn how integrating intelligence from multiple Clarivate products, powered by AI, drives confident predictions of the potential competitive impact of your drug on the market and patients' lives.

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