



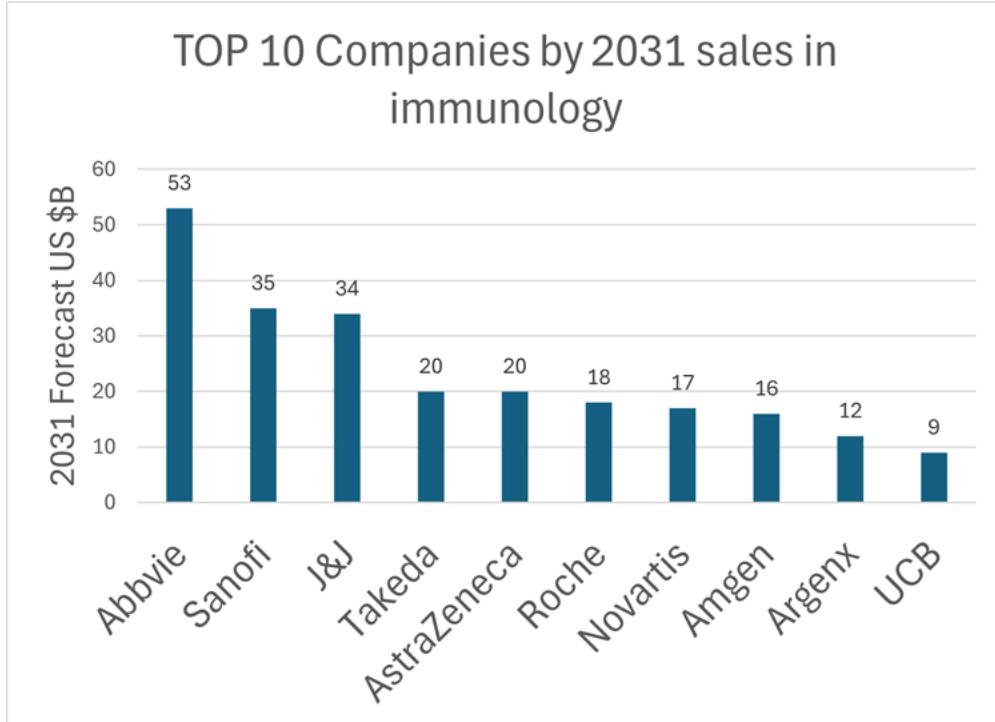
## Top 10 in Immunology

Linda Pullan in Pullan's Pieces #220 November 2025

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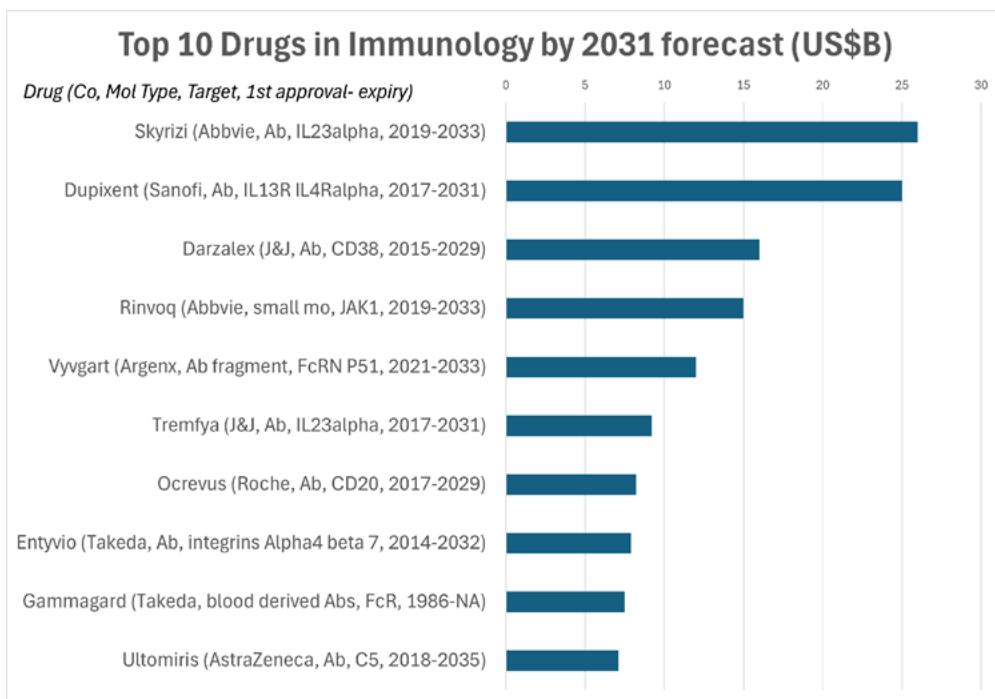
I thought a Top 10 set of lists would be a fun way to do an overview of immunology.

### Who are the top 10 companies in immunology sales?



Most of these are among the biggest companies by total sales. Argenx and UCB are the exceptions.

### What are the top 10 drugs in immunology?



Abbvie has 2, J&J has 2, Takeda has 2.

Abs dominate the list.

Most of these big drugs have their first approvals years ago already, indicating the long time it takes to add indications and get to these multi-billion sales.

Note also that the sales reflect all indications and include indications such as MS and T1D that may be classified as other than immunology within GlobalData and within companies.

## Which companies have the biggest pipelines in immunology?

### Top 10 Companies by Size of Immunology Pipeline

	Ph 1	Ph 2	Ph 3	Pre-reg
Hengrui	31	42	25	5
AstraZeneca	23	46	20	1
Lilly	49	25	10	1
BMS	38	30	15	
Novartis	35	34	9	
Merck & Co	42	18	12	1
Pfizer	34	24	13	1
Chia Tai Tinqing	29	21	13	2
Sanofi	13	34	12	2
Abbvie	29	20	10	2

Hengrui has the most molecules in the development pipeline. AstraZeneca is 2nd. Lilly and Merck have the most in Phase I.

## What are the top indications in immunology?

### Top 10 Immunology Indications by US prevalence (GlobalData)

IndicationName	Total_Cases
Rheumatoid Arthritis	1,723,164
Sicca Syndrome (Sjogren)	404,891
Systemic Sclerosis (Scleroderma)	287,279
Systemic Lupus Erythematosus	244,467
Primary Immune Deficiency (PID)	179,332
Sarcoidosis	118,509
Pulmonary Sarcoidosis	103,932
Myasthenia Gravis	84,461
Lupus Nephritis	72,496
Granulomatosis with Polyangiitis (Wegener's Granulomatosis)	25,718

The list of indications from GlobalData does not include MS and T1D which drive some of the sales of the top drugs. The top 10 from a Co-pilot search include the big indications.

### Top 10 Immunology Indications by US Prevalence (Co-Pilot)

Disease	Estimated U.S. Prevalence	Notes
Rheumatoid Arthritis (RA)	~1.3 million adults	Most common autoimmune arthritis
Type 1 Diabetes Mellitus	~1.5 million people	Includes ~199,000 under age 20
Psoriasis	>8 million people	Skin disease; 30% may develop Psoriatic Arthritis
Psoriatic Arthritis	~3–6 million people	Often co-occurs with psoriasis
Multiple Sclerosis (MS)	~1 million people	Neurological autoimmune disease
Systemic Lupus Erythematosus (SLE)	~204,000 diagnosed	Most common form of lupus
Inflammatory Bowel Disease (IBD)	2.4–3.1 million people	Includes Crohn's disease and ulcerative colitis
Hashimoto's Thyroiditis	~21 million (est.)	~70% of 30M hypothyroid patients
Graves' Disease	~3.3 million people	~1% of U.S. population
Celiac Disease	~2 million diagnosed	~1% of population; 80% undiagnosed
Sjögren's Syndrome	~3–4 million people	Often underdiagnosed; 90% are women

**What indications do the top 10 companies think are attractive for their Phase 2 assets?**

## Top Indications in Phase 2 (highest stage) by Top 10 Companies in Immunology

Indications	# of Drugs
Rheumatoid Arthritis	5
Systemic Lupus Erythematosus	5
Transplant Rejection	2
Sicca Syndrome (Sjogren)	2
Autoimmune Disorders	1
Inflammation	1
Systemic Sclerosis (Scleroderma)	1
Kidney Transplant Rejection	1
Lupus Nephritis	1
Anti-Neutrophil Cytoplasmic Antibody-Associated Vasculitis (ANCA Vasculitis)	1

**What targets are the top 10 companies in immunology working on in preclinical?**

### Targets of top 10 in preclinical

Abbvie	CMKLR1, IL23R, Complement C5
Sanofi	IRAK4
Takeda (including Nihon sub)	RORgamma, nACh and FcR
Roche (including Genentech and Poseida)	CD19xBCMA, KLKB1, USP1, RIP1K

The list of preclinical programs includes 6 small mol, 3 Abs, 2 peptides, 2 proteins, 1 cell therapy and 1 gene therapy.

## What are the biggest partnership deals in 2025 (so far) in immunology?

### Top 10 deals in immunology in 2025

Licensee	Licensor	Deal Value (US\$m)	Upfront Payment (US\$m)	Highest deal stage	mol type of lead	Link
Novartis AG	Monte Rosa Therapeutics Inc	5,700.00	120.00	Discovery	Small Molecule	<a href="#">Degraders to Treat Immune-mediated Diseases</a>
AstraZeneca Plc	Harbour Biomed	4,880.00		Preclinical	Monoclonal Antibody	<a href="#">to Discover and Develop Next-Generation Therapeutic Antibodies</a>
Vor BioPharma Inc	RemeGen Co Ltd	4,125.00	125.00	Marketed	Fusion Protein	<a href="#">for Late-Stage Autoimmune Asset</a>
Brigen LLC	Shanghai Keyi Pharmaceutical Technology Co Ltd	2,135.00		Phase II	Gene-Modified Cell Therapy	<a href="#">BCMA/CD19 CAR-T to US Firm in USD 2.1b Deal</a>
Zenasis BioPharma Inc	InnoCare Pharma Ltd	2,100.00		Marketed	Small Molecule	<a href="#">Three Autoimmune Candidates, Including Orelabrutinib, a BTK Inhibitor in Phase 3 for MS</a>
Vertex Pharmaceuticals	Enlaza Therapeutics	2,045.00	45.00	Discovery	Biologic	<a href="#">to Develop War-Lock Drug Conjugates and T-Cell Engagers for Improved Conditioning and Autoimmune Diseases</a>
AbbVie Inc	IGI Therapeutics SA	1,925.00	700.00	Phase I	Monoclonal Antibody	<a href="#">ISB 2001, a First-in-Class CD38xBCMAxCD3 Trispecific Antibody</a>
Argenx SE	Unnatural Products	1,500.00		Discovery	Synthetic Peptide	Multi-Target Collaboration
Chugai Pharmaceutical Co Ltd	Rani Therapeutic Holdings	1,085.00	10.00	Discovery	Monoclonal Antibody	<a href="#">For Multiple High-Value Therapeutics Including Rare Disease and Immunology Programs</a>
Biogen Inc	Vanqua Bio Inc	1,060.00	70.00	Preclinical	Small Molecule	<a href="#">Oral C5aR1 Antagonist from Vanqua Bio to Expand Immunology Portfolio</a>

Devil in the details, especially for what is behind the BioBucks, of course! But fun!