Pipeline and Commercial Insight: Migraine - Challenges ahead for first-in-class developments

Description: Introduction

After 4 years of steady growth, the migraine market across the seven major regions was valued at $4.6 billion in 2008. However, following US patent expiries of both the acute migraine market leading brand, Imitrex (sumatriptan; GlaxoSmithKline), and leading prophylactic Topamax (topiramate; Johnson & Johnson), the market value plummeted by almost $1.5 billion from 2008 to $3.6 billion in 2009.

Scope

- Analysis of current migraine treatment approaches and drug recommendations, patient acquisition process and unmet medical needs.

- In depth analysis of historic (2005-09) and future (2010-2019) seven major market prescription sales dynamics.

- Review of the migraine drug pipeline dynamics, including detailed profiling of key late-stage products.

- Commercial and clinical assessment of key late-stage pipeline drugs, with key opinion leader comment and region-specific sales forecasts to 2019.

Highlights

In 2019, the seven major migraine market total is forecast to reach $2.8 billion. While high generic competition will continue to dictate the US market decline, proposed or enacted price reductions in the European countries will offset the uptake of new products and inhibit growth in this region.

Sumavel DosePro (sumatriptan needleless injection; Zogenix and Astellas) and Levadex (dihydroergotamine mesylate orally inhaled; MAP Pharmaceuticals) have been designed to provide a rapid acting and convenient relief of migraine. However, high cost, associated reimbursement challenges and patient preference for oral pills will limit uptake of both.

Despite upcoming regulatory uncertainty and future reimbursement hurdles, Allergan’s Botox is set to become the first product approved for chronic migraine. Separately, while recent safety issues represent a major knock-back for Merck & Co., telcagepant is still predicted to become a useful alternative to the triptans.

Reasons to Purchase

- Quantify the current and future size of the migraine market.

- Identify potential licensing opportunities based on product portfolios and anticipated market needs.

- Understand the country-specific impact of key events in the migraine market during the forecast period 2010 to 2019.

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