R&D Trends: Allergic Rhinitis - Immunotherapy takes a rising share of the pipeline

Description: Introduction

The 2011 pipeline shows strong interest in immunotherapy, which makes up 42% of products in development. Advancements in clinical trials and key partnerships are increasing exposure of this class. In this largely stable market, areas of innovation exist with nasal antihistamine/corticosteroid combinations remaining highly anticipated, while a number of novel targeted therapies raise skepticism.

Features and benefits

- Assessment of the allergic rhinitis pipeline, drawing out trends by class and the potential to address unmet needs
- Analysis of clinical trial design, highlighting innovation and anticipated future changes, with a focus on recent developments in immunotherapy
- Discussion of novel early stage approaches and the future of treatment in allergic rhinitis, with insight from key opinion leaders

Highlights

- 60 products in development for allergic rhinitis have been identified. The late-stage pipeline is heavily skewed towards immunotherapy, which makes up 12 of 13 Phase III products. Immunotherapy shows the greatest innovation, with considerable change to clinical trials, and increased focus on sublingual tablet franchises.
- Discussions with key opinion leaders reveal a largely stable market for symptomatic treatment; however, areas of innovation exist, such as the development of combination products. Analysis of comparator therapies highlights areas of unmet need.
- A number of novel targeted therapies are moving through the pipeline, and two CRTH2 antagonists have reached Phase II. Key opinion leaders express skepticism over their clinical viability, with efficacy expected to fall short of established treatment classes. However, they may find a place in the treatment of select groups of patients.

Your key questions answered

- Which characteristics of symptomatic treatments can be improved upon, and what would it take to create a new gold standard?
- What are the driving forces behind allergic rhinitis clinical trial design and how has it evolved?
- To what extent will the growing investment in immunotherapy change the future of treatment?
- Is there value in novel targeted therapies or will current treatments continue to dominate?

Contents: Executive Summary
- Strategic scoping and focus
- Datamonitor key findings
- Related reports

OVERVIEW
- Catalyst
- Summary

CLINICAL PIPELINE OVERVIEW
- Allergen immunotherapy dominates late-stage pipeline
- Analysis by formulation demonstrates innovation in the pipeline
- Late-stage discontinued development compounds
- Epinastine nasal formulation (Inspire Pharmaceuticals)
- Loratadine/montelukast (Merck)
- Sublingual immunotherapies (Greer)

TARGET PRODUCT PROFILE
Telfast/Allegra (fexofenadine; Sanofi-Aventis)
  Pivotal trial data for Telfast/Allegra
Nasonex (mometasone; Merck & Co.)
  Pivotal trial data for Nasonex
  Target product profile versus current level of attainment

CLINICAL TRIAL DESIGN IN ALLERGIC RHINITIS
  Trends in clinical trial endpoints
  Symptom scores
  Allergy challenges tackle seasonal variations
  Study populations
  Comparator drugs
  Drug development guidelines in allergen immunotherapy
  Typical allergic rhinitis clinical trials
    Symptomatic treatment
    Allergen immunotherapy
  Future developments in clinical trial design

INNOVATIVE EARLY-STAGE APPROACHES
  Sublingual immunotherapy franchises
  Antihistamine combinations
  Novel targeted therapies

THE FUTURE OF TREATMENT IN ALLERGIC RHINITIS
  Combination antihistamine/corticosteroid therapy
  Sublingual shift in immunotherapy

BIBLIOGRAPHY
  Journal papers
  Websites

APPENDIX
  Contributing experts
  Conferences attended
  Report methodology

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