Product Profiles: Moderate-To-Severe Acute Pain - Intensifying competition in breakthrough cancer pain market

Description: Since the beginning of 2011, several drugs have progressed through the late-stage clinical pipeline for acute pain. In June 2011, the US Food and Drug Administration (FDA) approved Lazanda (fentanyl nasal spray; Archimedes) for the management of breakthrough pain in cancer patients and Oxecta (oxycodone hydrochloride; Acura Pharmaceuticals/Pfizer) for acute and chronic moderate to severe pain.

Features and benefits
- Understand Datamonitor's independent appraisal of marketed brands and key pipeline agents indicated for moderate to severe acute pain conditions.
- Illustrate how pipeline and marketed drugs compare to one another in terms of clinical and commercial attributes.
- Assessment of the strengths, weaknesses, opportunities, and threats for key marketed and pipeline therapies.
- Review important clinical developments for key pipeline agents with analysis of the latest clinical trial data.
- Determine to what extent future therapies satisfy the main clinical unmet needs in the treatment of moderate to severe acute pain.

Highlights
- Nucynta's (tapentadol; Johnson & Johnson/Grünenthal) ability to address one of the greatest unmet needs in acute pain management – reduction in opioid-related adverse events – will ensure that the product captures market share from oxycodone. Uptake of Nucynta will also benefit from J&J's and Grünenthal's strong presence in the pain market.
- Following the US launch of Lazanda (fentanyl nasal spray; Archimedes) in October 2011, Datamonitor expects a further two rapidly acting oral fentanyl formulations to enter the breakthrough pain market by H2 2014. These products potentially offer patients a faster onset of pain relief than available oral fentanyl formulations.
- Two pipeline opioids aim to address the need for improved opioid tolerability: MoxDuo IR (morphine and oxycodone; QRxPharma) and M6G (morphine-6-glucuronide; Paion). Several other candidates offer opioid-sparing potential, although the most promising of these is Pacira's Exparel (bupivacaine hydrochloride).

Your key questions answered
- Who will be the winners and losers in the future breakthrough cancer pain market?
- What are the commercial prospects for non-opioid analgesics, such as ketamine and bupivacaine?
- Will any pipeline candidates provide improved tolerability over established treatment options?
- What are the most promising drug candidates in development for the potential treatment of post-operative pain?

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