R&D Trends: Depression - Clinical attrition driven by mature market conditions

Description: Several drugs have progressed through the pipeline for depression in recent years, including Pristiq (desvenlafaxine; Pfizer), Oleptro (trazodone extended release; Labopharm), and Viibryd (Forest) in the US, and Valdoxan (agomelatine; Servier/Novartis) in the EU. Despite the heightened competition within the marketplace, an abundance of drugs remain in the pipeline.

Scope:
- Understand key dynamics in the R&D pipeline for new depression therapies
- Benchmark novel and existing therapies using the target product profile identified by Datamonitor
- Support R&D decision making by evaluating antidepressant clinical trial designs that have set a precedent
- Evaluate the most promising new pharmacological targets in early-stage development
- Access The prediction of how the treatment landscape may change in the next 20 years

Highlights:
- There are 46 separate programs across all stages of clinical development for depression, down from 66 in 2007 with a notably high attrition of early-stage projects. Reasons for this include promising new targets failing to yield an effective antidepressant, and big players such as GlaxoSmithKline switching its research focus.
- Although depleted, the early-stage pipeline still has the potential to change current treatment algorithms, which are dominated by monoamine reuptake inhibitors. Popular approaches include glutamate and neuropeptide receptor modulation. Datamonitor sees the future of treatment in depression as the specific targeting of treatment-resistant patients
- Clinical trial design in depression is largely standardized. Although not required, head-to-head trials may allow for a more favorable label and explicit marketing claims. Datamonitor believes that future trials will be designed for regulatory approval in patients with treatment-resistant depression, or for use as an add-on to existing therapies.

Reasons to buy:
- What are the key trends in the depression pipeline?
- What is the clinical gold standard and how do new candidates have to compare to this to successfully penetrate the market?
- How will new antidepressant treatments evolve in the next 20 years?

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