R&D Trends: Allergic Rhinitis – Immunotherapy Dominates the Pipeline

Description:
Overview of the allergic rhinitis pipeline, from preclinical to preregistration, with analysis by phase and formulation, as well as discussion of clinical trial design and trends. The future of treatment is assessed based on progress in development.

The 2012 pipeline shows continued strong interest in immunotherapy, which makes up 43% 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 showing progress, while a number of novel targeted therapies raise skepticism.

Scope
- 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
- Datamonitor has identified 65 products in development for allergic rhinitis. The late-stage pipeline is heavily skewed towards immunotherapy, which makes up all 15 Phase III products. Immunotherapy shows the greatest innovation, with considerable change to clinical trials, and an 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, including five CRTH2 antagonists. Key opinion leaders and recent discontinuations have cast 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 patient groups.

Reasons to Purchases
- 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?

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