Hypertension (Event Driven)

Description: The hypertension market, though mature and heavily genericized, offers significant opportunities for blood pressure (BP)-lowering drugs that can prevent the development of cardiovascular disease, cerebrovascular disease, or end-organ damage. The best on-market single-agent therapies achieve only relatively modest levels of BP reduction, hence the increasing prominence of fixed-dose combination (FDC) drugs in the market. However, physicians value the ability to titrate drug therapy, and payers are increasingly rewarding innovation and novel modes of therapeutic action, which signals room for new antihypertensive agents. For existing and emerging therapies alike, the high disease prevalence, ease of diagnosis, and recognized need to treat hypertension also translates to substantial sales potential, even for therapies that capture a small share of the market.

Questions Answered in This Report:

- A series of novel double-drug and triple-drug FDCs have recently entered the market. How will these agents affect sales of single agents? What competitive challenges will these novel FDCs face in the treatment of hypertension?

- Losartan (Merck’s Cozaar) was the first angiotensin II receptor antagonist (AIIRA) to lose patent exclusivity, in 2010. Will the launch of generic losartan alter the dynamics of AIIRA use? How will the genericization of the AIIRA class affect prescribing of other drug classes and the overall hypertension market?

- Although demonstrating BP reductions in Phase III trials is generally sufficient for regulatory approval, acceptance by physicians and payers remains a considerable challenge, in light of the number of established and inexpensive therapies on the market. What novel therapies are being developed for hypertension and what are their chances of success? What are the opinions of thought leaders on these agents?

Scope:

Markets covered: United States, France, Germany, Italy, Spain, United Kingdom, Japan.

Primary research: 14 country-specific interviews with experts in the treatment of hypertension.

Epidemiology: Prevalence of hypertension by age-group, by drug-treated status and stage of hypertension, by comorbidity, and by polypharmacy level and control status; prevalence of prehypertension.

Population segments in market forecast: Hypertension.

Emerging therapies: Phase II: 2 drugs; Phase III: 2 drugs; preregistration: 1 drug; Coverage of 4 preclinical and Phase I products.

Market forecast features: Using a patient-based model, we forecast population sizes and drug sales for hypertension through 2020.

Contents:

Executive Summary
What are the key parameters of the hypertension market?
What factors are driving the market for hypertension therapies?
What factors are constraining the market for hypertension therapies?
What are the drug development activities of note in hypertension?
What do the experts say?
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