Epilepsy Therapeutics in Major Developed Markets to 2019 - New AEDs with Novel Mechanisms of Action Signal a Shift in Treatment Patterns

Description: "Epilepsy Therapeutics in Major Developed Markets to 2019 - New AEDs with Novel Mechanisms of Action Signal a Shift in Treatment Patterns", which provides in-depth analysis of epilepsy market within the eight major developed markets of the US, UK, France, Germany, Italy, Spain, Japan and Canada. The report provides an estimation of the market size for 2012, along with market forecasts to 2019. It also covers disease epidemiology, treatment algorithms, treatment patterns, in-depth analysis of the pipeline, and deal analysis.

The value of the epilepsy market in the major developed markets amounted to an estimated $3.4 billion in 2012 and is expected to register a Compound Annual Growth Rate (CAGR) of 3.9% to reach $4.5 billion by 2019. This modest growth is attributed to the recent approval of drugs with novel mechanisms of action that are expected to offer more therapeutic options to prescribers. The US takes major share of 55% of the global epilepsy market.

In the US, three new anti-epileptic drugs have been approved since 2012: Trobalt, Aptiom, and Fycompa and another, brivaracetam, is expected also to be launched during the forecast period. Of these, Trobalt and Fycompa have novel mechanisms of action and improved safety and tolerability that elicited significant interest from prescribers. Continued uptake of second- and third-generation anti-epileptic drugs is also expected to contribute towards revenues in these eight regions. However, the epilepsy market could face the restricting influence of generic competition as a result of recent patent expiries in all major markets of two key branded drugs, Keppra and Lamictal.

Scope

- A brief introduction to epilepsy, including disease pathogenesis, risk factors, diagnosis and treatment options

- In-depth analysis of major marketed products covering product performance, product life-cycle and a heat map depicting comparative analysis of safety and efficacy parameters

- A comprehensive review of the epilepsy pipeline which includes individual analysis of promising late-stage pipeline drugs that are most likely to enter the market during the forecast period. The pipeline is analyzed on the basis of Phase distribution, molecule type and molecular target

- Additional clinical trial analysis by Phase, trial size, trial duration and program failure rate for each molecule type and mechanism of action

- Multi-scenario forecasts of the epilepsy market over the 2012-2019 period in the eight major developed markets

- In-depth analysis of licensing and co-development agreements and an overview of key agreements that could impact growth trends

- Key drivers and restraints that have had and are expected to have a significant impact upon the market

Reasons to buy

- Align your product portfolio to markets with high growth potential

- Develop market entry and expansion strategies by identifying the potential regions and therapeutic segments poised for strong growth

- Devise effective, tailored strategies for each country through the understanding of key drivers and barriers in the anti-epileptic drugs market
- Develop key strategic initiatives based upon an understanding of key focus areas and leading companies

- Accelerate and strengthen your market position by identifying key companies for mergers, acquisitions and strategic partnerships

Contents:

1 Table of Contents
1.1 List of Tables
1.2 List of Figures

2 Introduction
2.1 Disease Overview
2.2 Epidemiology
2.3 Symptoms
2.4 Etiology
2.5 Pathophysiology
2.6 Co-morbidities/Complications
2.7 Diagnosis
2.8 Prognosis
2.9 Treatment Efficacy
2.10 Treatment Options
2.10.1 Ion Channel Modulators
2.10.2 GABA-ergic Facilitation
2.10.3 Excitatory Amino Acid Inhibitors
2.10.4 Synaptic Modulators
2.11 Non-pharmacological Management
2.11.1 Lobectomy and Lesionectomy
2.11.2 Ketogenic Diet and Modified Atkins Diet
2.11.3 Vagus Nerve Stimulation

3 Epilepsy Therapeutic Landscape
3.1 Overview
3.2 Lyrica (pregabalin)
3.3 Lamictal (lamotrigine)
3.4 Keppra (levetiracetam)
3.5 Zonegran (zonisamide)
3.6 Vimpat (lacosamide)
3.7 Aptiom/Zebinix (eslicarbazepine acetate)
3.8 Fycompa (perampanel)
3.9 Trobalt/Potiga (ezogabine/retigabine)
3.10 Banzel/Inovelon (rufinamide)
3.11 Comparative Efficacy and Safety of Marketed Products

4 Pipeline for Epilepsy Therapeutics
4.1 Overall Pipeline
4.2 Pipeline by Mechanism of Action
4.3 Clinical Trials
4.3.1 Failure Rate
4.3.2 Patient Enrolment and Clinical Trial Size
4.3.3 Clinical Trial Duration
4.4 Promising Pipeline Candidates
4.4.1 Brivaracetam – UCB
4.4.2 Ganaxolone – Marinus Pharmaceuticals

5 Epilepsy Therapeutics Market Forecast to 2019
5.1 Geographical Markets
5.1.1 Major Developed Markets
5.1.2 The US
5.1.3 Top Five EU Countries
5.1.4 Japan
5.1.5 Canada
5.2 Drivers and Barriers
5.2.1 Drivers
5.2.2 Barriers

6 Deals and Strategic Consolidations
6.1 Deals Analysis
6.2 Research and Development Co-development Agreements
6.3 Research and Development Licensing Agreements

7 Appendix
7.1 Abbreviations
7.2 References
7.3 References for Heat Maps
7.4 Pipeline Products by Phase
7.4.1 Discovery
7.4.2 Preclinical
7.4.3 IND-filed and Phase
7.4.4 Phase I
7.4.5 Phase II
7.4.6 Phase III
7.4.7 Pre-registration
7.5 Market Forecasting Data Tables to 2019
7.5.1 Major Developed Markets
7.5.2 US
7.5.3 UK
7.5.4 France
7.5.5 Germany
7.5.6 Italy
7.5.7 Spain
7.5.8 Japan
7.5.9 Canada
7.6 Research Methodology
7.6.1 Coverage
7.6.2 Secondary Research
7.6.3 Primary Research
7.6.4 Therapeutic Landscape
7.6.5 Geographical Landscape
7.6.6 Pipeline Analysis
7.7 Expert Panel Validation
7.8 Contact Us
7.9 Disclaimer

1.1 List of Tables
Table 1: Epilepsy Therapeutics, Global, Types of Seizures, 2013
Table 2: Epilepsy Therapeutics, Heat Maps for Efficacy and Safety of Marketed Products, References
Table 3: Epilepsy Therapeutics, Global, Pharmaceutical Pipeline (Discovery), 2013
Table 4: Epilepsy Therapeutics, Global, Pharmaceutical Pipeline (Preclinical), 2013
Table 5: Epilepsy Therapeutics, Global, Pharmaceutical Pipeline (IND/CTA-filed), 2013
Table 6: Epilepsy Therapeutics, Global, Pharmaceutical Pipeline (Phase I), 2013
Table 7: Epilepsy Therapeutics, Global, Pharmaceutical Pipeline (Phase II), 2013
Table 8: Epilepsy Therapeutics, Global, Pharmaceutical Pipeline (Phase III), 2013
Table 9: Epilepsy Therapeutics, Global, Pharmaceutical Pipeline (Pre-registration), 2013
Table 10: Epilepsy Therapeutics, Major Developed Markets, Market Forecast, 2012–2019
Table 11: Epilepsy Therapeutics, US, Market Forecast, 2012–2019
Table 12: Epilepsy Therapeutics, UK, Market Forecast, 2012–2019
Table 13: Epilepsy Therapeutics, France, Market Forecast, 2012–2019
Table 14: Epilepsy Therapeutics, Germany, Market Forecast, 2012–2019
Table 15: Epilepsy Therapeutics, Italy, Market Forecast, 2012–2019
Table 16: Epilepsy Therapeutics, Spain, Market Forecast, 2012–2019
Table 17: Epilepsy Therapeutics, Japan, Market Forecast, 2012–2019
Table 18: Epilepsy Therapeutics, Canada, Market Forecast, 2012–2019

1.2 List of Figures
Figure 1: Epilepsy Therapeutics, Epidemiology, Major Developed Markets, 2012
Figure 2: Epilepsy Therapeutics, Major Developed Markets, Approved Anti-epileptic Drugs, 2013
Figure 3: Epilepsy Therapeutics, Lyrica, Global, Revenue ($bn), 2013
Figure 4: Epilepsy Therapeutics, Lamictal, Global, Revenue ($m), 2009–2013
Figure 5: Epilepsy Therapeutics, Keppra, Global, Revenue ($bn), 2009–2013
Figure 6: Epilepsy Therapeutics, Zonegran, Global, Revenue ($m), 2009–2013
Figure 7: Epilepsy Therapeutics, Vimpat, Global, Revenue ($m), 2009–2013
Figure 8: Epilepsy Therapeutics, Global, Comparative Safety and Efficacy of Marketed Products (Heat Map), 2013
Figure 9: Epilepsy Therapeutics, Global, Overall Pipeline Analysis, 2013
Figure 10: Epilepsy Therapeutics, Global, Pipeline Analysis, by Mechanism of Action, 2013
Figure 11: Epilepsy Therapeutics, Global, Pipeline, Clinical Trial Failure Rate, 2013
Figure 12: Epilepsy Therapeutics, Global, Pipeline, Clinical Trial Size, 2013
Figure 13: Epilepsy Therapeutics, Global, Pipeline, Clinical Trial Duration, 2013
Figure 14: Epilepsy Therapeutics, Major Developed Markets, Treatment Usage Pattern and Market Size, 2012–2019
Figure 15: Epilepsy Therapeutics, US, Treatment Usage Pattern, ACoT and Market Size, 2012–2019
Figure 16: Epilepsy Therapeutics, Top Five EU Countries, Treatment Patterns (’000), 2012–2019
Figure 17: Epilepsy Therapeutics, Top Five EU Countries, Annual Cost of Treatment ($), 2012–2019
Figure 18: Epilepsy Therapeutics, Top Five EU Countries, Market Size ($m), 2012–2019
Figure 19: Epilepsy Therapeutics, Japan, Treatment Usage Pattern, ACoT and Market Size, 2012–2019
Figure 20: Epilepsy Therapeutics, Canada, Market Size, 2012–2019
Figure 21: Epilepsy Therapeutics, Deals by Region, Value and Year, 2006–2013
Figure 22: Epilepsy Therapeutics, Deals by Molecule Type and Mechanism of Action, 2006–2013
Figure 23: Epilepsy Therapeutics, Co-development Deals, Territory, 2006–2013
Figure 24: Epilepsy Therapeutics, Licensing Deals, by Territory, 2006–2013
Figure 25: GBI Research Market Forecasting Model

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