PharmaPoint: Macular Edema and Macular Degeneration - Global Drug Forecast and Market Analysis to 2023

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Summary

Macular Edema is a condition where fluid accumulates on the macula, leading to vision impairment or in severe cases even vision loss. The three main types of ME are diabetic macular edema (DME), and macular edema following either a central or branch retinal vein occlusion (ME-CRVO and ME-BRVO). Age-related macular degeneration (AMD) is a painless eye condition which leads to gradual, irreversible, loss of central vision, and is one of the leading causes of blindness among people aged 50 and over in the developed world. Currently the ME and AMD markets are dominated by the use of anti-VEGF monotherapy, however, in recent years, corticosteroid implants have been reaching the ME market which could challenge the stronghold these drugs have in this sector. The AMD market will see the arrival of the first therapies to treat dry AMD, fulfilling a huge unmet need in the management of this retinal disease, and these first-in-class therapies will strongly drive the market growth over the next ten years. The launch of wet AMD adjunctive therapies will also see a significant change in the treatment of AMD patients and have a positive impact on the market growth.

Highlights

Key Questions Answered

- The ME market has been dominated by anti-VEGF drugs Lucentis and Avastin for many years, however, rival drug Eylea has recently gained approval for ME indications across the 7MM. How will this impact the positions that Lucentis and Avastin hold in this market? How will this change over the forecast period, and which drug will covet the leading position in 2023?
- The current late stage AMD pipeline is varied, with first-in-class drugs in development for both dry AMD and wet AMD. Which of these will have the biggest impact on the AMD market? What strategies are developers undertaking to penetrate the wet AMD market? Will the novel dry AMD drugs fulfil the huge unmet need for this retinal disease?
- Population aging is occurring in almost all countries worldwide, particularly in the 7MM. This is expected to have a significant impact on the prevalence of age-related diseases such as AMD and conditions causing ME. How will epidemiological changes impact the growth of the future ME and AMD markets?

Key Findings

- The main driver of growth in the AMD market will be the introduction of first-in-class drugs over the forecast period. The launch of two new therapies for dry AMD will significantly grow this market and the arrival of adjunctive therapies for wet AMD will further strengthen this growth in the AMD market.
- The rapid expansion of Eylea within the ME market will lead to a shift in market leader over the forecast period, with Lucentis losing this position to rival anti-VEGF drug Eylea.
- The biggest barrier for growth in the ME and AMD markets will be the increasing pressure to show drug cost-effectiveness. This is likely to have a negative impact on these markets, as regulatory bodies are adopting stricter criteria for new drug approvals and reimbursement listing.
- Significant opportunities remain for further drug development in both the ME and AMD markets as numerous unmet needs remain, in particular the need for effective dry AMD drugs with non-invasive formulations.

Scope

- Overview of ME and AMD, including epidemiology, etiology, pathophysiology, symptoms, diagnosis, and treatment guidelines.
- Annualized ME and AMD market revenue, annual cost of therapy and treatment usage pattern data from 2013 and forecast for ten years to 2023.
- Key topics covered include market characterization, unmet needs, R&D and clinical trials assessment, late stage clinical trial analysis and implications for the ME and AMD therapeutics markets.
- Pipeline analysis: focus on the seven late-stage pipeline ME and AMD drugs discussing emerging trends as well as overview of earlier phase drugs.
- Analysis of the current and future market competition in the global ME and AMD therapeutics market. Insightful review of the key industry drivers, restraints and challenges. Each trend is independently researched to provide qualitative analysis of its implications.

Reasons to buy
- Develop and design your in-licensing and out-licensing strategies through a review of pipeline products and technologies, and by identifying the companies with the most robust pipeline. Additionally a list of acquisition targets included in the pipeline product company list.
- Develop business strategies by understanding the trends shaping and driving the global ME and AMD therapeutics markets.
- Drive revenues by understanding the key trends, innovative products and technologies, market segments, and companies likely to impact the global ME and AMD therapeutics markets in future.
- Formulate effective sales and marketing strategies by understanding the competitive landscape and by analysing the performance of various competitors.
- Identify emerging players with potentially strong product portfolios and create effective counter-strategies to gain a competitive advantage.
- Track drug sales in the global ME and AMD therapeutics markets from 2013-2023.
- Organize your sales and marketing efforts by identifying the market categories and segments that present maximum opportunities for consolidations, investments and strategic partnerships.

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