Wearable Infusion Systems

Description: The increasing number of drugs that must be infused is creating a new class of drug delivery devices – devices that can deliver therapeutic drugs in volumes up to 10 mL and higher to ambulatory patients. Wearable subcutaneous infusion systems are targeting the growing need for administering biologicals – a segment that includes monoclonal antibodies, immune modulators and blood factors – that are indicated for chronic conditions.

These devices distinguish themselves from syringes and injectors by delivering drug volumes in excess of 1-2 mL for durations that are measured in minutes rather than seconds. Several products in this device class have already reached the market, and recent agreements between device suppliers and pharma companies validate the market need that wearable infusion systems address. We expect wearable infusion systems to achieve and sustain double digit unit growth through the end of the decade.

What You Will Learn
- What wearable infusion systems are currently marketed or in development, who are the suppliers, and what are the device specifics?
- What are the therapeutic markets being targeted by wearable infusion systems?
- What are the essential design factors, material selection issues, technologies and market development issues for wearable infusion systems?
- What are the major factors that will drive wearable infusion systems demand?
- How are wearable infusion systems currently aligned with various drug classes and therapeutic markets?
- What is the addressable market for wearable infusion systems?
- What is the expected impact of wearable infusion systems on drug delivery markets?
- Who are the significant players in this segment? What are their strategies? Who are their alliance partners?

Contents:
1. Executive Summary Injectable/Infusible Market Segment Dynamics Drug Development Trends
   - Drug Delivery Device Evolution
   - The Trend toward Patient Self-Administration
   - Enabling Technology Wearable Infusion Systems – Design Factors

2. Volumes and Viscosities
   - Primary Packaging
   - Injection Methodology
   - Patient Interface
   - Injection Technology
   - Piston
   - Rotary Pump
   - Expandable Inner Chamber
   - Expandable Power Supply

3. Wearable Infusion Systems – Commercial Devices

4. OEM Devices
   - Electronic Disposable
   - Electronic Semi-disposable
   - Mechanical Disposable

5. Captive Devices
   - Electronic Disposable

6. Single Product Devices
   - Neulasta On-body Injector (Amgen)
7. Wearable Infusions Systems – Near-Term Drug Products

8. Capricor
   - CSL Behring
   - Roche
   - scPharmaceuticals
   - Ferring
   - SteadyMed

9. Wearable Infusion Therapeutics – The Addressable Market

10. Inflammatory Autoimmune Diseases
    - Blood Disorders
    - Cardiovascular
    - Neurology
    - Oncology
    - Metabolic Diseases
    - Multiple Sclerosis
    - Reproductive Health
    - Upper Respiratory Diseases

11. Market Factors

12. Self-Administration and Patient Compliance
    - Regulatory Guidance and Product Approvals
    - Drug Product Differentiation/Marketability

13. Company Profiles

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