PharmaPoint: Bipolar Disorder - Global Drug Forecast and Market Analysis to 2024

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Summary

Bipolar disorder is a mental disorder characterized by periods of mania and depression. The frequency, severity, and pattern of these episodes can vary considerably over time and between individuals, making bipolar disorder one of the most challenging psychiatric disorders to manage. The bipolar disorder market is widely genericized, with additional key brands expected to face patent or data exclusivity expiries during the forecast period. The bipolar disorder market size is anticipated to contract significantly between 2014 and 2024, driven largely by the generic erosion of Otsuka's Abilify, the highest selling bipolar disorder product in 2014. The uptake of novel atypical antipsychotic products will be a principal driver of growth over the forecast period, as these products offer clinical advantages that will drive strong uptake. However, sales of these agents will be limited by the continued utilization of established generic products. There are currently only two products in Phase III development, which indicates that bipolar disorder will remain a field of high unmet need during the forecast period.

Highlights

Key Questions Answered

- The bipolar disorder market is heavily genericized and many key players have chosen to deprioritize the indication. In light of this, what are the current clinical and environmental unmet needs? Will there be opportunities in this market for drug developers throughout the forecast period?
- The current late-stage bipolar disorder pipeline is sparse, with only two products in Phase III development. What impact will these drugs have on the market? How will they affect the treatment algorithm for bipolar disorder? Will these drugs fulfill any of the unmet needs for bipolar disorder?
- The management of bipolar disorder patients is challenging and a large number of variables can impact treatment outcomes. How does the diagnosis and treatment of bipolar disorder differ amongst the 8MM? Which treatment options are most commonly prescribed in each market, and how will prescribing patterns change over the forecast period?

Key Findings

- The main driver of growth in the bipolar disorder market will be the uptake of novel atypical antipsychotic products, such as Otsuka/Lundbeck's Abilify Maintena and Allergan/Gedeon Richter/Mitsubishi Tanabe's Vraylar. These agents are forecast to be the highest selling bipolar disorder products by 2024, accounting for 34.9% of the bipolar disorder market in the 8MM.
- There are very few products approved for the treatment of major depressive episodes, despite the fact that patients most commonly experience this episode type. This unmet need is not expected to be addressed during the forecast period due to the sparsity of the late-stage pipeline.
- The biggest barrier for growth in the bipolar disorder market will be fierce competition from generic products. This limits market opportunities for new and existing players, as uptake of novel pipeline products would be hindered by their premium price point.
- Considerable opportunity remains for products with superior safety profiles compared to the currently available drugs. KOLs noted that EPS and metabolic changes were significant concerns related to the antipsychotic drugs.

Scope

- Overview of bipolar disorder, including epidemiology, etiology, pathophysiology, symptoms, diagnosis, and treatment guidelines.
- Annualized bipolar disorder market revenue, annual cost of therapy and treatment usage pattern data from 2014 and forecast for ten years to 2024.
- Key topics covered include market characterization, unmet needs, R&D and clinical trials assessment, late
stage clinical trial analysis and implications for the bipolar disorder therapeutics market.
- Pipeline analysis: focus on two late-stage pipeline bipolar disorder drugs, discussing emerging trends as well as an overview of earlier phase drugs and a top-line analysis of off-label treatments.
- Analysis of the current and future market competition in the global bipolar disorder 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

The report will enable you to -
- 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 bipolar disorder therapeutics market.
- Drive revenues by understanding the key trends, innovative products and technologies, market segments, and companies likely to impact the global bipolar disorder therapeutics market in future.
- Formulate effective sales and marketing strategies by understanding the competitive landscape and by analyzing 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 bipolar disorder therapeutics market from 2014-2024.
- 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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