Novel Drugs and Devices to Lower Intraocular Pressure, 2016 - 2026

Description: The Novel Drugs and Devices to Lower Intraocular Pressure, 2016 - 2026 report provides an extensive study of the emerging market of such novel drugs, devices and surgical procedures for the treatment of elevated IOP. The focus of this study is on the applications of these novel treatment options, both marketed and under development, and their likely mid to long term evolution. These treatment options claim to provide consistent benefits related to IOP lowering and are anticipated to gain widespread adoption in the foreseeable future.

The report covers various aspects of this market; some of these are outlined below:

- A detailed assessment of the current market landscape of novel drugs and devices, key players involved, the status of development of various pipeline products and the target patient segments.
- Comprehensive profiles covering mechanism of action, clinical trial details and associated developments of Rho-associated protein kinase (ROCK) inhibitors, ROCK / norepinephrine transporter (NET) inhibitors and NO donating prostaglandins in late stage of development.
- Comprehensive profiles highlighting the IOP reduction approach, key performance drivers, safety and efficacy of novel surgical procedures that have been approved or are in advanced stages of development.
- Comparative analysis of MIGS devices based on various parameters such as drainage route, length of the implant, involvement of conjunctiva, type of procedure (ab interno or ab externo), procedure duration and ability of the device to treat 360 degrees.
- An informed view on the likely future evolution of such novel drugs, sustained release drug delivery devices and surgical procedures over the next decade. This includes sales forecasts of six novel drugs, including Rhopressa, Roclatan and Vesneo. Similarly, we have presented our view on the future market size of six drug delivery devices, including Bimatoprost SR, OTX-TP and punctal plug delivery system. We have also determined the likely future revenues for MIGS and non-MIGS surgical devices (BAGS, ABS, NIGP and NPGS).

To account for the uncertainties in the market, we have provided three market forecast scenarios that represent three different tracks of the market's evolution. Given the current unmet need for safer and more effective therapeutic options and the rich pipeline of novel drugs and devices, we expect this market to witness significant growth in the coming few years.

Our opinions and insights presented in this study were influenced by discussions conducted with several key players in this domain. The report features detailed transcripts of interviews held with Bob Butchofsky (Founder and CEO, Mati Therapeutics), Suzana Nahum Zilberberg (CEO, Bio-Light Life Sciences), Ronen Castro (CEO, IOPtima) and Donald Schwartz (CEO and President, Eye Sonix).

Chapter Outlines

Chapter 2 provides an executive summary and offers a high level view on where the market for IOP lowering novel drugs and devices is headed in the mid to long term.

Chapter 3 is a general introduction to IOP and the various diseases associated with elevated IOP. It contains detailed discussions on aqueous humor dynamics and the various factors responsible for an increase in IOP. The chapter also outlines the currently available treatment modalities for IOP related diseases and their shortcomings.

Chapter 4 includes information on novel drugs that are either already available or being evaluated in different stages of development for the treatment of IOP. In this chapter, we have presented a comprehensive pipeline of all such products that we identified during our research. It presents an analysis of the aforementioned pipeline based on a number of different parameters, including phase of development, mechanism of action, disease sub-type, route of administration and dosage schedule.

Chapter 5 presents information on the various types of novel devices (surgical and drug delivery devices) that are either already available in the market or being evaluated in different stages of development. Similar to the previous chapter, we have presented a comprehensive pipeline of all relevant devices that we came across during our research. The chapter provides an analysis of the pipeline based on the phase of development of the product, its purpose, the category of devices it belongs to and the approach / pathway it
employs for IOP reduction. In addition, we have added a separate section on drug delivery devices highlighting details such as the type of drug delivered and the nature of implant (biodegradable or non-biodegradable).

Chapter 6 provides detailed company profiles of the prominent players that are involved in investigating novel drugs for the treatment of elevated IOP. Each company profile includes a brief overview of the company, its financial information, key performance drivers, and its future outlook and strategy. In addition, the profiles cover details of late stage candidate therapies, such as Rho-associated protein kinase (ROCK) inhibitors, ROCK / norepinephrine transporter (NET) inhibitors and NO donating prostaglandins, which are being evaluated for the treatment of elevated IOP. These details include an overview of the product, its mechanism of action, collaborations / partnerships specific to the particular drug, key developmental events and the associated clinical trials landscape.

Chapter 7 provides details on some of the important players involved in the development of MIGS and BAGS devices. Each company profile includes a brief overview of the company, funding instances, financial information, key performance drivers, and its future outlook and strategy. In addition, the profiles cover details of company’s approved / clinical stage devices. These details include a brief overview of the product, its specifications (size, shape, material and surgical procedure used to insert the device into the eye), the IOP reduction approach it follows, details of its clinical studies, and efficacy and safety data.

Chapter 8 offers a comprehensive perspective on how the market for novel drugs and devices in this field is likely to evolve over the next ten years. In this chapter, we have forecasted the sales of six novel drugs, including Rhopressa, Roclatan and Vesneo. Similarly, we have presented our view on the future market size of six drug delivery devices, which include Bimatoprost SR, OTX-TP and punctal plug delivery system. We have also determined the likely future revenues for MIGS and non-MIGS devices (BAGS, ABS, NIGP and NPGS). Due to uncertainties surrounding some of the key assumptions made within our forecast model, we have presented three different evolutionary scenarios for the overall market, namely the base, conservative and optimistic scenarios.

Chapter 9 provides information on MIGS devices covering the salient features that distinguish them from traditional surgical interventions. The chapter includes an overview of the current market landscape of MIGS devices and presents an approval timeline highlighting all the approved devices of this nature. We have also presented a comparative spider web analysis of MIGS devices (for both approved and under development devices) based on different parameters, such as drainage route, length of the implant, involvement of conjunctiva, type of procedure (ab interno or ab externo), duration of the procedure, the ability to treat entire Schlemm’s canal and the target patient segment.

Chapter 10 summarizes the overall report. In this chapter, we have provided a recap of the key takeaways and our independent opinion regarding the market based on the research and analysis described in the previous chapters.

Chapter 11 is a collection of interview transcripts of our discussions with some of the key players in this industry. We have presented the details of our conversations with Bob Butchofsky (Founder and CEO, Mati Therapeutics), Suzana Nahum Zilberberg (CEO, Bio-Light Life Sciences), Ronen Castro (CEO, IOPtima) and Donald Schwartz (CEO and President, Eye Sonix).

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