ADHD Therapeutics to 2020 - Broadened Diagnostic Criteria and Growing Adult Prevalence to Drive Market Growth despite Patent Expirations

Description: Changes in diagnostic criteria have reduced the symptom threshold for diagnosis and finally bring the acceptance of adult ADHD to the clinical setting, enabling those previously unable to obtain a diagnosis to be diagnosed for ADHD treatment. In the case of adult ADHD, 4.1% of US adults are believed to suffer from ADHD, 41.3% of these cases are classified as severe and would be eligible for therapeutic intervention.

The current ADHD therapeutics market is flooded with generics and dominated by the use of Extended-Release (ER) stimulant drugs which have superseded short-acting, Immediate-Release (IR) formulations. With dose titration per patient, ER stimulants are usually effective in 70-90% of patients. However, all stimulants apart from Vyvanse come with potential for abuse. Non-stimulants are used for those who are poor-responders, have poor cardiac history or prefer non-stimulant medication however their efficacy is lacking in comparison. Currently, 10% of adult patients are using a combination of ER and IR treatment for an additional duration, representing an unmet need within this growing ADHD segment.

The current developmental pipeline addresses these gaps in the market, with three potential non-stimulants entering the market during the forecast period and SHP465, which aims to address the unmet need in the adult ADHD segment with its tailored duration of action. In spite of anticipated drug approvals, patents expirations and increased generic competition will cause ACoT to remain fairly static and even decrease across some nations.

As a result, the global market is not expected to be driven by drug approvals, but primarily by a growing prevalence, increase in rates of diagnosis, and therefore eligible treatment population. Global market revenues are forecast to rise at a CAGR of 4.8% to $9.4 billion by 2020.

Scope:

The report analyzes the incidence of ADHD, current options for its treatment, pipeline, market forecasts and deals surrounding ADHD therapeutics. The report covers and includes:
- A brief introduction into ADHD, symptoms, diagnosis, epidemiology, etiology, pathophysiology, economic implications of their treatment and the current treatment options for the condition.
- An analysis of the currently marketed ADHD drugs, including recent sales figures, safety and efficacy data of the drugs and a discussion of the likely performance of each drug within the forecast period.
- Comprehensive reviews of the pipeline for ADHD drugs, including individual analysis of a number of late-stage pipeline drugs that have the potential to enter the market in the forecast period. The pipeline is analyzed on the basis of phase distribution, molecule type and mechanism of action.
- Additional statistical analysis of clinical trial duration, size and attrition rate by phase and mechanism of action.
- An in-depth, multi-scenario forecast model for the ADHD drugs market in the US, Canada, UK, France, Germany, Italy, Spain and Japan. Each model is based on the anticipated performance of both marketed drugs and any expected to be approved within the forecast period, and takes into account drug cost, patent expiration, efficacy, safety and likely prescription volumes.
- A detailed discussion of drivers and barriers for the ADHD market
- An in-depth analysis of licensing and co-development deals involving drugs indicated in ADHD, including an in-depth outline of key deals.

Reasons to purchase:

The report will assist business development and enable marketing executives to strategize their product launches, by allowing them to:
- Understand the key signaling pathways and molecular targets currently under investigation in drug development for ADHD.
- Gain an in-depth view of the current status of the ADHD therapeutics pipeline, including the most common molecule types and molecular targets in development.
- Observe trends in clinical trial duration and size amongst clinical phases and mechanisms of action, and use the clinical trial attrition rate analysis to assess the risk profiles of current and/or future developmental
programs for ADHD therapeutics.
- Assess the potential clinical and commercial impact of current late-stage pipeline molecules in the ADHD therapeutics market.
- Analyze current and past deals surrounding ADHD therapeutics, including their value, year of deal and in-depth details of key deals within the ADHD market.

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