

MARKET REPORT



PharmaPoint: Allergic Rhinitis - Global Drug Forecast and Market Analysis to 2024

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PharmaPoint: Allergic Rhinitis - Global Drug Forecast and Market Analysis to 2024

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Summary

Allergic Rhinitis (AR) is becoming an increasingly prevalent condition, with the most common form being moderate to severe in nature (Baena-Cagnani et al., 2015). According to the European Academy of Allergy and Clinical Immunology (EAACI), 50% of Europeans will suffer from an allergy by 2027 (Papadopoulos et al., 2012). The allergic rhinitis (AR) market has declined very slowly over the past decade, as has it become saturated with relatively efficacious standard therapies, such as antihistamines (AHs), intranasal corticosteroids (INCS), and leukotriene receptor antagonists (LRAs), and has also been facing increasing generic competition. Despite the rising prevalence of AR, and a large patient population that is dissatisfied with the current treatment options, the market size for symptomatic therapies alone is set to shrink, as the remaining branded products lose patent protection. There is an increasing shift in the transfer of prescription AR products to over-the-counter (OTC) status, which is driving patients to pharmacies rather than to physicians, further diluting the prescription AR market. The immense, crowded generic AR market has been largely unappealing to drug manufacturers. Consequently, only two symptomatic therapies are expected to launch before 2024.

Highlights

Key Questions Answered

- Allergic Rhinitis symptoms can be controlled in the majority of patients using the current standard therapies. Nevertheless, in around 20% of people with allergic rhinitis, the disease remains symptomatic and inadequately controlled. Therefore, there are considerably high unmet needs within the indication. What are the main unmet needs in this market?
- The current late-stage allergic rhinitis pipeline is sparse. Will the late-stage symptomatic drugs make a significant impact on the allergic rhinitis market? What strategies are drug developers undertaking to penetrate this difficult but potentially very lucrative market? How will immunotherapies affect the market landscape?
- The prevalence of environmental diseases, including allergic rhinitis, is increasing worldwide, with an estimated 46 million US citizens are likely to suffer from allergic rhinitis in 2024. How will epidemiological changes impact the growth of the future market?

Key Findings

- The main driver of growth in the AR market will be the introduction of several AIT tablets: Merck's Grastek (grass), Ragwitek (ragweed), and Mitizax (house dust mite [HDM]) tablets, as well as Greer's Oralair (grass) in the US. These new products overcome the inconvenience of conventional subcutaneous immunotherapies (SCITs).
- The major global barrier for the AR market will be the increasing push for patients to self-medicate using OTC drugs will decrease the prescription AR drug market size.
- There is little room for new entrants, as the market is well-served by a wealth of symptomatic therapies. Since the competition is increasing, the market for AR therapies is becoming increasingly less lucrative. Also, there

are currently no breakthrough symptomatic therapy products in clinical development.

- The remaining clinical unmet needs in this market include the requirement for more efficacious products, and the underserved area of causative therapies, such as immunotherapies, which target the underlying cause of the disease.

Scope

- Overview of AR, including epidemiology, etiology, pathophysiology, symptoms, diagnosis, and treatment guidelines.

- Annualized AR therapeutics market revenue, annual cost of therapy and treatment usage pattern data from 2014 and forecast for ten years to 2024.

- Key topics covered include strategic competitor assessment, market characterization, unmet needs, clinical trial mapping and implications for the AR therapeutics market.

- Pipeline analysis: comprehensive data split across different phases, emerging novel trends under development, and detailed analysis of late-stage pipeline drugs.

- Analysis of the current and future market competition in the global AR 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 AR therapeutics market.

- Drive revenues by understanding the key trends, innovative products and technologies, market segments, and companies likely to impact the global AR therapeutics market 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 AR 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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