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Forecast Insight: Depression - High rewards for novel and adjunctive therapies in treatment-resistant depression

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Abstracts

Introduction

Generic erosion, particularly in the US, will contribute to an overall depression market decline from $11.9bn in 2009 to $11.2bn in 2019 across the seven major markets. In this cost-competitive market, new drugs are expected to be used as second- or third-line options as monotherapies or adjuncts for patients non-responsive to generic SSRIs and SNRIs or intolerant to their side effects.

Features and benefits

Provides quantitative and qualitative analysis of the likely impact that recent events will have on the future depression market.

Includes depression-specific and country-specific sales forecasts for the key brands, generics, and pipeline agents in the seven major markets to 2019

Provides a global depression market snapshot, and analysis of growth trends in key markets outside of the seven major pharmaceutical markets.

Conclusions are supported by key opinion leader comment.

Highlights

At $8.6bn in 2009, the US was the largest and most lucrative of the seven major depression markets. However, the US market is to continue a trend of value decline following patent expiries of Lexapro (escitalopram), Effexor XR (venlafaxine extended release), Cymbalta (duloxetine), and brands belonging to the atypical antipsychotics class.Atypical antipsychotics are increasingly popular among psychiatrists as adjunctive therapies for treatment-resistant depression, and, with high price points, are driving market growth. Atypicals with favorable tolerability profiles and regulatory approval have competitive edge, such as Abilify (aripiprazole) and Seroquel XR (quetiapine).Datamonitor forecasts Novartis and Servier's Valdoxan (agomelatine) to achieve blockbuster sales following US launch in 2013. It is an effective new class of antidepressant with benefits on sleep quality and minimal to no sexual side effects. However, a high price and liver toxicity place it as a second- or third-line option after SSRIs and SNRIs.

Your key questions answered

What will be the impact of major generic launches to the depression market and what are the implications to prospective players?

What is the potential of Novartis and Servier's novel antidepressant Valdoxan (agomelatine)? How will it be positioned in the future marketplace?

How will Labopharm's Oleptro (trazodone extended release) perform in the competitive US depression market following launch in 2010?

What is the potential for pipeline therapies Lu AA21004 (Lundbeck and Takeda), TC-5214 (Targacept and AstraZeneca), and vilazodone (Clinical Data)?

Which of the seven major markets will show growth in sales over the forecast period (2010-19) and what will drive this growth?

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Report methodology

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