

R&D Trends: Allergic Rhinitis - Immunotherapy takes a rising share of the pipeline

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Abstracts

Introduction

The 2011 pipeline shows strong interest in immunotherapy, which makes up 42% of products in development. Advancements in clinical trials and key partnerships are increasing exposure of this class. In this largely stable market, areas of innovation exist with nasal antihistamine/corticosteroid combinations remaining highly anticipated, while a number of novel targeted therapies raise skepticism.

Features and benefits

Assessment of the allergic rhinitis pipeline, drawing out trends by class and the potential to address unmet needs

Analysis of clinical trial design, highlighting innovation and anticipated future changes, with a focus on recent developments in immunotherapy

Discussion of novel early stage approaches and the future of treatment in allergic rhinitis, with insight from key opinion leaders

Highlights

Datamonitor has identified 60 products in development for allergic rhinitis. The late-stage pipeline is heavily skewed towards immunotherapy, which makes up 12 of 13 Phase III products. Immunotherapy shows the greatest innovation, with considerable

change to clinical trials, and increased focus on sublingual tablet franchises.

Discussions with key opinion leaders reveal a largely stable market for symptomatic treatment; however, areas of innovation exist, such as the development of combination products. Analysis of comparator therapies highlights areas of unmet need.

A number of novel targeted therapies are moving through the pipeline, and two CRTH2 antagonists have reached Phase II. Key opinion leaders express skepticism over their clinical viability, with efficacy expected to fall short of established treatment classes. However, they may find a place in the treatment of select groups of patients.

Your key questions answered

Which characteristics of symptomatic treatments can be improved upon, and what would it take to create a new gold standard?

What are the driving forces behind allergic rhinitis clinical trial design and how has it evolved?

To what extent will the growing investment in immunotherapy change the future of treatment?

Is there value in novel targeted therapies or will current treatments continue to dominate?

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