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Stakeholder Insight: Osteoarthritis - Drug development lags behind rising osteoarthritis population

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Abstracts

Introduction

Datamonitor expect osteoarthritis prevalence to grow by over 10 million by 2020, owing mainly to an aging population. In the near-term the approach to treatment will remain constant, with improved side-effects dominating the unmet needs. However, therapies which target the underlying causes of osteoarthritis have the potential to reshape osteoarthritis treatment.

Scope

*Snapshot of the osteoarthritis market based on a survey of 180 rheumatologists/primary care physicians, with views from key opinion leader interviews

*Analysis of osteoarthritis epidemiology, with future projections of prevalence and patient numbers to 2020

*Overview of treatment options at the class and molecule level, as well as treatment outcome analysis

*Assessment of treatment satisfaction, unmet needs and physicians' awareness of key pipeline therapies

Highlights

The estimated diagnosis rate of 55% reflects a lack of treatment-seeking by mild

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sufferers of the disease, who often resort to self-medication. This equates to nearly 37 million undiagnosed patients in 2009 and with a predicted rise in osteoarthritis numbers this is a market with growth potential.

Pain-relieving drugs, particularly, oral non-steroidal anti-inflammatory drugs (NSAIDs) are the foundation of pharmacological therapy in osteoarthritis. Physicians continue to be concerned over NSAID toxicity, with three-quarters of severe patients who are receiving NSAIDs currently co-prescribed a gastroprotectant.

Physicians are generally unsatisfied with current osteoarthritis pharmacological treatments. A clear need for alternative drugs exists to treat this prevalent condition. 41% of physicians ranked disease modifying osteoarthritis drugs (DMOADs) as the highest unmet need, but the majority of physicians estimate that DMOADs are 8 years from the market.

Reasons to Purchase

*Understand current therapy trends for the major drug classes used in osteoarthritis split by disease severity and assess unmet needs in the disease

*Validate new product forecasting based on diagnosis rates and treatment by patient segmentation and drug class

*Use the interactive Excel model of treatment trees and patient numbers to estimate the osteoarthritis population in each of the seven major markets

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