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Generalized Anxiety Disorder (GAD)- Market Insight, Epidemiology and Market Forecast -2030

https://marketpublishers.com/r/GE5797921DA8EN.html
Date: October 2020
Pages: 166
Price: US$ 6,950.00 (Single User License)
ID: GE5797921DA8EN

Abstracts

This report can be delivered to the clients within 24 Hours

DelveInsight's 'Generalized Anxiety Disorder (GAD)-Market Insights, Epidemiology and Market Forecast—2030' report delivers an in-depth understanding of the GAD, historical and forecasted epidemiology as well as the GAD market trends in the United States, EU5 (Germany, France, Italy, Spain, and United Kingdom), and Japan.

The GAD market report provides current treatment practices, emerging drugs, GAD market share of the individual therapies, current and forecasted GAD market size from 2017 to 2030 segmented by seven major markets. The Report also covers current GAD treatment practice/algorithm, market drivers, market barriers and unmet medical needs to curate best of the opportunities and assesses underlying potential of the market.

Geography Covered

The United States

EU5 (Germany, France, Italy, Spain and the United Kingdom)

Japan

Study Period: 2017–2030

Generalized Anxiety Disorder (GAD): Disease Understanding and Treatment Algorithm

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Generalized Anxiety Disorder Overview

Generalized Anxiety Disorder (GAD) is characterized by persistent and exaggerated anxiety and worry about everyday life events with no obvious reasons for worry. People with GAD may anticipate disaster and may be overly concerned about money, health, family, work, or other issues. Individuals with GAD find it difficult to control their worry. They may worry more than seems warranted about actual events or may expect the worst even when there is no apparent reason for concern. According to Anxiety and Depression Association of America (ADAA), GAD affects around 6.8 million adults or 3.1% of the US adult population in any given year and the criteria used for diagnosis was based on DSM-IV. However, latest DSM-V yielded an influx of new GAD cases which give rise to the prevalence rate as well in adult population (i.e. 12-month prevalence rate is 4% in the US adult population). Women are twice as likely to be affected. GAD can begin at any point in the life cycle but usually develops between childhood and middle age. People with GAD experience a combination of emotional, behavioral, and physical symptoms that often fluctuate, becoming worse at times of stress. The anxiety is often associated with physical symptoms, such as sleep disturbance, restlessness, muscle tension, gastrointestinal symptoms, and chronic headaches and others. It also includes several psychological symptoms.

Generalized Anxiety Disorder Diagnosis

GAD is diagnosed when a person finds it difficult to control worry on more days than not for at least 6 months. An evaluation of symptom criteria, as outlined in DSM-5, is the first step for diagnosis followed by physical exam, blood tests, urine tests, gastric reflux tests, such as an X-ray of the digestive system or an endoscopy procedure to look at the esophagus, and stress tests.

Generalized Anxiety Disorder Treatment

Treatment prescribed by the doctor depends on many factors, including symptoms intensity and duration, impact on the patient’s ability to function in daily life, comorbid conditions such as depression, and medical conditions. Patients with mild anxiety and worry who do not meet the DSM-V criteria for GAD often benefit from supportive therapy and encouragement.

The standard category of pharmacological agents used in the management of GAD includes Selective serotonin re-uptake inhibitors (SSRIs), Selective norepinephrine reuptake inhibitors (SNRIs), Pregabalin, Tricyclic

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antidepressants (TCAs), Benzodiazepines, Antihistamines, Atypical antipsychotics, Antioxidants, and others

SSRIs and SNRIs (Citalopram, Escitalopram, Fluoxetine, Paroxetine, Sertraline, Duloxetine, Venlafaxine XR etc.) and buspirone are considered as first treatment strategy.

Generalized Anxiety Disorder (GAD) Epidemiology

The GAD epidemiology division provides the insights about historical and current GAD patient pool and forecasted trend for each seven major countries. It helps to recognize the causes of current and forecasted trends by exploring numerous studies and views of key opinion leaders. This part of the DelveInsight report also provides the diagnosed patient pool and their trends along with assumptions undertaken.

Key Findings

The disease epidemiology covered in the report provides historical as well as forecasted GAD epidemiology [segmented as Total12-Month Prevalent Cases of Generalized Anxiety Disorder in 7MM (Adult, Adolescents and Children),Gender-Specific Prevalence of Generalized Anxiety Disorder in 7MM,Age-Specific Prevalence of Generalized Anxiety Disorder, Severity-Specific Prevalence of Generalized Anxiety Disorder] scenario of GAD in the 7MM covering the United States, EU5 countries (Germany, France, Italy, Spain, and the United Kingdom), and Japan from 2017 to 2030.

Country Wise-Generalized Anxiety Disorder Epidemiology

The Total 12-Month Prevalent Cases of GAD in 7MM was 16,606,987 in 2017, based on DSM-V criteria. Estimates show that the United States accounted for the highest number of cases of GAD among all the 7MM countries, i.e., 11,113,727. Among the EU5, France has the highest prevalence with estimated 1,304,965 cases in 2017.

In 2017, there were a total of 4,083,434 cases of GAD in the age-group (18–24), and 685,341 cases in 65 and above, in the United States.

The severity of GAD Is divided into mild, moderate, or severe based on the number of criteria symptoms such as a functional disability in work role

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performance, household maintenance, social life, and intimate relationships with the severity of the symptoms.

In 2017, there were 238,201 mild cases, 459,904 moderate cases and 333,070 severe cases of GAD in the US. The overall children and adolescent specific severity specific cases of GAD are subjected to increase in the coming years.

Generalized Anxiety Disorder Drug Chapters

Drug chapter segment of the Generalized Anxiety Disorder report encloses the detailed analysis of Generalized Anxiety Disorder marketed drugs and late stage (Phase-III and Phase-II) pipeline drugs. It also helps to understand the Generalized Anxiety Disorder clinical trial details, expressive pharmacological action, agreements and collaborations, approval and patent details, advantages and disadvantages of each included drug and the latest news and press releases.

Generalized Anxiety Disorder Emerging Drugs

Troriluzole: BioHaven Pharmaceuticals

Troriluzole is a third-generation pro drug and new chemical entity that modulates glutamate, the most abundant excitatory neurotransmitter in the human body. The primary mode of action of troriluzole is reducing synaptic levels of glutamate. Troriluzole monotherapy at 100mg twice daily did not differentiate from placebo on the primary endpoint of the mean change from baseline on the Hamilton Anxiety Rating Scale (HAM-A) after eight weeks of treatment.

BNC210: Bionomics

Bionomics' first in class small molecule BNC210, is a negative allosteric modulator of the ?7 nicotinic acetylcholine receptor in development for the treatment of anxiety disorders, co-morbid anxiety and depression. Single doses of BNC210 have been evaluated in GAD patients in a fMRI study with the emotional faces task, and a behavioral study with the joystick operated runway task.

PH94B: Pherin Pharmaceuticals/VistaGen Therapeutics

VistaGen’s PH94B neuroactive nasal spray is fundamentally different from all current

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drug treatments for GAD. PH94B binds to nasal chemosensory receptors which activate neural circuits that lead to rapid suppression of fear and anxiety. With its novel mechanism of pharmacological action, rapid-onset of therapeutic effects and exceptional safety and tolerability profile shown in clinical trials to date.

Products detail in the report

Generalized Anxiety Disorder Market Outlook

Key Findings

According to DelveInsight, Generalized Anxiety Disorder market in the 7MM is expected to change in the study period 2017–2030.The therapeutic market of Generalized Anxiety Disorder in seven major markets was found to be USD 3,164 million in 2017which is expected to increase during study period (2017–2030).

The United States Market Outlook

In 2017, the total market size of GAD therapies was found to be USD 2,463 million in the United States which is expected to increase in the study period (2017–2030).

EU-5 Countries: Market Outlook

In 2017, the total market size of GAD therapies was found to be USD 542 million in the EU-5 countries which is expected to increase in the study period (2017–2030).

Japan Market Outlook

The total market size of GAD therapies in Japan was found to be USD 160 million in 2017.

Generalized Anxiety Disorder Pipeline Development Activities

The drugs which are in pipeline includes:

1 BNC210: Bionomics
2 PH94B: Pherin Pharmaceuticals/VistaGen Therapeutics
3 Troriluzole: BioHaven Pharmaceuticals

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List is not exhaustive, full list and Products detail will be provided in the report

Pipeline Development Activities

Key Points

1. In February 2020, Biohaven Pharmaceutical Holding Company Ltd. reported negative topline results from its Phase III clinical trial evaluating troriluzole compared to placebo for the treatment of patients with GAD.
2. In September 2018, VistaGen acquired from Pherin an exclusive worldwide license to develop and commercialize PH94B.

Generalized Anxiety Disorder Drugs Uptake

Currently, the GAD market is mainly dominated by generics. And also generics for the most of therapies has entered in to the market. This generic nature of market creating high hurdles for approval and market access to the new drugs

Access and Reimbursement Scenario in Generalized Anxiety Disorder Therapies

In August 2009, the Institute for Quality and Efficiency in Health Care (IQWiG) investigated whether patients with depression benefit from taking drugs belonging to the SNRI drug class. According to the report, the benefit of both drugs, venlafaxine and duloxetine were proven compared to a sham drug (placebo): patients respond better to the therapy and suffer less from the symptoms of depression.

KOL-Views

To keep up with current market trends, we take KOLs and SME’s opinion working in Generalized Anxiety Disorder domain through primary research to fill the data gaps and validate our secondary research. Their opinion helps to understand and validate current and emerging therapies treatment patterns or Generalized Anxiety Disorder market trend. This will support the clients in potential upcoming novel treatment by identifying the overall scenario of the market and the unmet needs.

Competitive Intelligence Analysis

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We perform Competitive and Market Intelligence analysis of the Generalized Anxiety Disorder Market by using various Competitive Intelligence tools that includes – SWOT analysis, PESTLE analysis, Porter's five forces, BCG Matrix, Market entry strategies etc. The inclusion of the analysis entirely depends upon the data availability.

Scope of the Report

The report covers the descriptive overview of Generalized Anxiety Disorder, explaining its causes, signs and symptoms, pathophysiology and currently available therapies.

Comprehensive insight has been provided into the Generalized Anxiety Disorder epidemiology and treatment in the 7MM.

Additionally, an all-inclusive account of both the current and emerging therapies for Generalized Anxiety Disorder are provided, along with the assessment of new therapies, which will have an impact on the current treatment landscape.

A detailed review of Generalized Anxiety Disorder market; historical and forecasted is included in the report, covering drug outreach in the 7MM.

The report provides an edge while developing business strategies, by understanding trends shaping and driving the global Generalized Anxiety Disorder market.

Report Highlights

In the coming years, Generalized Anxiety Disorder market is set to change due to the rising awareness of the disease, and incremental healthcare spending across the world; which would expand the size of the market to enable the drug manufacturers to penetrate more into the market.

The companies and academics are working to assess challenges and seek opportunities that could influence Generalized Anxiety Disorder R&D. The therapies under development are focused on novel approaches to treat/improve the disease condition.

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Major players are involved in developing therapies for Generalized Anxiety Disorder. Launch of emerging therapies, will significantly impact the Generalized Anxiety Disorder market.

A better understanding of disease pathogenesis will also contribute to the development of novel therapeutics for Generalized Anxiety Disorder.

Our in-depth analysis of the pipeline assets across different stages of development (Phase III and Phase II), different emerging trends and comparative analysis of pipeline products with detailed clinical profiles, key cross-competition, launch date along with product development activities will support the clients in the decision-making process regarding their therapeutic portfolio by identifying the overall scenario of the research and development activities.

Generalized Anxiety Disorder Report Insights

Patient Population

Therapeutic Approaches

Generalized Anxiety Disorder Pipeline Analysis

Generalized Anxiety Disorder Market Size and Trends

Market Opportunities

Impact of upcoming Therapies

Generalized Anxiety Disorder Report Key Strengths

11 Years Forecast

7MM Coverage

Generalized Anxiety Disorder Epidemiology Segmentation

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Key Cross Competition

Highly Analyzed Market

Drugs Uptake

Generalized Anxiety Disorder Report Assessment

SWOT Analysis

Current Treatment Practices

Unmet Needs

Pipeline Product Profiles

Conjoint Analysis

Market Attractiveness

Market Drivers and Barriers

Key Questions

Market Insights:

What was the Generalized Anxiety Disorder Market share (%) distribution in 2017 and how it would look like in 2030?

What would be the Generalized Anxiety Disorder total market Size as well as market size by therapies across the 7MM during the study period (2017–2030)?

What are the key findings pertaining to the market across the 7MM and which country will have the largest Generalized Anxiety Disorder market size during the study period (2017–2030)?

At what CAGR, the Generalized Anxiety Disorder market is expected to grow in

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the 7MM during the study period (2017–2030)?

What would be the Generalized Anxiety Disorder market outlook across the 7MM during the study period (2017–2030)?

What would be the Generalized Anxiety Disorder market growth till 2030 and what will be the resultant market size in the year 2030?

How would the market drivers, barriers and future opportunities affect the market dynamics and a subsequent analysis of the associated trends?

Generalized Anxiety Disorder patient types/ pool where unmet need is more and whether emerging therapies will be able to address the residual unmet need?

How emerging therapies are performing on the parameters like efficacy, safety, route of administration (RoA), treatment duration and frequencies based on their clinical trial results?

Among the emerging therapies, what are the potential therapies which are expected to disrupt the Generalized Anxiety Disorder market?

Epidemiology Insights:

What is the disease risk, burden and unmet needs of the Generalized Anxiety Disorder?

What is the historical Generalized Anxiety Disorder patient pool in seven major markets covering the United States, EU5 (Germany, France, Italy, Spain, and the United Kingdom) and Japan?

What would be the forecasted patient pool of Generalized Anxiety Disorder in 7 major markets covering the United States, EU5 (Germany, France, Italy, Spain, and the United Kingdom) and Japan?

What will be the growth opportunities in the 7MM with respect to the patient population pertaining to Generalized Anxiety Disorder?

Out of all the 7MM countries, which country would have the highest prevalent

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population of Generalized Anxiety Disorder during the study period (2017–2030)?

At what CAGR the population is expected to grow in the 7MM during the study period (2017–2030)?

What are the various recent and upcoming events which are expected to improve the diagnosis of Generalized Anxiety Disorder?

Current Treatment Scenario, Marketed Drugs and Emerging Therapies:

What are the current options for the treatment of Generalized Anxiety Disorder along with the approved therapy?

What are the current treatment guidelines for the treatment of Generalized Anxiety Disorder in the US, Europe and Japan?

What are the Generalized Anxiety Disorder marketed drugs and their MOA, regulatory milestones, product development activities, advantages, disadvantages, safety and efficacy, etc.?

How many companies are developing therapies for the treatment of Generalized Anxiety Disorder?

How many therapies are developed by each company for the treatment of Generalized Anxiety Disorder?

How many emerging therapies are in mid stage, and late stage of development for the treatment of Generalized Anxiety Disorder?

What are the key collaborations (Industry–Industry, Industry–Academia), Mergers and acquisitions, licensing activities related to the Generalized Anxiety Disorder therapies?

What are the recent novel therapies, targets, mechanisms of action and technologies developed to overcome the limitation of existing therapies?

What are the clinical studies going on for Generalized Anxiety Disorder and their

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status?

What are the key designations that have been granted for the emerging therapies for Generalized Anxiety Disorder?

What are the global historical and forecasted market of Generalized Anxiety Disorder?

Reasons to buy

The report will help in developing business strategies by understanding trends shaping and driving the Generalized Anxiety Disorder market.

To understand the future market competition in the Generalized Anxiety Disorder market and Insightful review of the key market drivers and barriers.

Organize sales and marketing efforts by identifying the best opportunities for Generalized Anxiety Disorder in the US, Europe (Germany, France, Italy, Spain, and the United Kingdom) and Japan.

Identification of strong upcoming players in market will help in devising strategies that will help in getting ahead of competitors.

Organize sales and marketing efforts by identifying the best opportunities for Generalized Anxiety Disorder market.

To understand the future market competition in the Generalized Anxiety Disorder market.

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