

Migraine Drugs Market Analysis Report By Therapeutic Class (Triptans, CGRP-based Therapies, Ditans, Neurotoxins, NSAIDs), By Treatment, By Route of Administration, And Segment Forecasts, 2018 - 2025

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Abstracts

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The global migraine drugs market size is expected to be valued at USD 7.7 billion by 2025, as per a new report by Grand View Research, Inc., exhibiting an 18.0% CAGR during the forecast period. The market is largely driven by factors such as rise in disease prevalence, development of novel therapies, lifestyle changes, and hormonal medications.

Migraine is a debilitating neurological disease characterized by recurrent attacks of severe throbbing head pain that can last for more than three days. Migraine pain may get worse on movement, preventing the patient from carrying out normal, day-to-day activities. In about one-third of attacks, both sides of the head, face, or neck are affected.

Over the past five years, the global migraine drugs market has been relatively stagnant, with the market mainly dominated by usage of generic triptans and other off-label drugs. Majority of the currently prescribed drugs for both acute and preventative treatment are associated with poor efficacy and an unfavorable side-effect profile.

Launch of Amgen/ Novartis' CGRP mAb Aimovig is the first step toward revolutionizing the treatment paradigm of migraine prevention. For drug manufacturers likely to enter the market by 2019, such as Eli Lilly, Teva Pharma, and Alder BioPharma, pricing will

be a key differentiating factor as all CGRP-based therapies have a similar efficacy and safety profile.

Further key findings from the report suggest:

Germany leads the European market, driven by rising disease prevalence, novel drug launches, and increase in R&D activities

The acute migraine treatment market will be supported by rapid uptake of novel drug classes such as CGRP receptor antagonists and ditans currently under active investigation in multiple Phase II/III trials

Biohaven's rimegepant is expected to face competition from Allergan's ubrogepant, which has shown superior efficacy in Phase III trials compared to rimegepant

Eli Lilly's Phase III 5-HT_{1F} receptor agonist Lasmiditan is expected to be a novel first-line non triptan acute treatment option for patients in whom triptans are contraindicated

Approximately 20% of patients seeking preventive treatment for migraine do not respond to available generic medications. Several biologics and small molecule drugs are undergoing active development to target high unmet needs in the preventive treatment segment

Drugs with novel targets in early-phase development include AOBiome Therapeutics' AOB-203 (antibacterial), Winston Pharma's Dolorac (histamine H₁ receptor antagonists), NeuroAxons' NXN-188 (combination of NOS inhibitor and a triptan), and Biohaven's BHV-3500 (gepant). These novel agents are under evaluation for both episodic and chronic migraine in multiple Phase I/II trials.

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