PARKINSON’S DISEASE - CURRENT AND FUTURE PLAYERS


Sales for Parkinson’s Disease Market
The Parkinson’s disease market in the US, France, Germany, Italy, Spain, the UK, Japan, and Brazil is expected to grow at a compound annual growth rate (CAGR) of 4.0% from sales of $3.6 billion in 2012 to $5.3 billion in 2022.

Major drivers of growth for the global Parkinson’s disease market during the forecast period are:

- An aging population that will increase prevalence of Parkinson’s disease in all markets covered
- Launch of Adenosine 2A (A<sub>2A</sub>) antagonists and levodopa reformulations that will add to market share
- Technological advances and innovation in drug delivery systems
- High degree of polypharmacy
- High patient compliance

Major barriers of growth for the global Parkinson’s disease market during the forecast period are:

- Austerity measures in Europe to reduce healthcare costs
- Lack of disease-modifying therapies in late-stage development

The figure given below represents the global sales for Parkinson’s disease by region during the forecast period from 2012–2022.

![Sales for Parkinson’s Disease by Region, 2012–2022](chart.png)
Executive Summary

Marketing Partnerships Will be Necessary as Smaller Companies Take on Risk in Early-Stage PD Discovery

Merck and Roche were the earliest entrants to the Parkinson’s disease market with the introduction of levodopa (with branded drugs Sinemet and Madopar) and were followed by the next round of market entrants, non-ergoline dopamine agonists, which became a popular option for physicians and patients alike (GSK’s Requip/Requip XL, UCB’s Neupro). Most of the early entrants, namely Merck, Roche, and GSK, have left the Parkinson’s disease space, Novartis as the only current player who also has a late-stage pipeline product targeting Parkinson’s disease.

The high-risk, high-reward Parkinson’s disease market draws interest from small companies and startups, while deterring Big Pharma from investing too much in early-stage development. However, the multi-billion-dollar Parkinson’s disease industry has held the interest of such large pharmaceutical companies as Merck, Roche, Novartis, and GSK, who prefer to enter the market late-stage as partners. This is especially predominant in GlobalData’s gap analysis during the forecast period, as several companies with strong marketed drugs have become stagnant players, with no late-stage compounds. This situation may quickly change as the small companies emerging as future leaders (for example, Civitas and Impax) may eventually seek partnerships with Big Pharma.

The Parkinson’s disease market has seen as many re-formulations as novel compounds in the last 10 years such as GSK’s Requip XL. Such reformulations may be a strategic decision to extend patent life, but most often meet an unmet medical need. For example, oral administration of apomorphine had limited efficacy due to low bioavailability, but was effective at treating OFF episodes when administered subcutaneously.

Another growing trend is the reformulation of gold-standard therapy levodopa, a very effective and safe medication for Parkinson’s disease. There are many companies venturing into this with their formulations, for example Impax’s Rytary, Intec’s CD/LD-GR, Osmotica’s OS-320, and Depomed’s DM-1992. Its predominance in the Parkinson’s disease market, effectiveness, lack of patent protection and long history of use make it a perfect candidate for companies developing slow-release technologies.

Below figure presents a gap analysis for the Parkinson’s disease space during the forecast period from 2012–2022, listing companies as current players, future players, or current and future players.
Executive Summary

Company Portfolio Gap Analysis in Parkinson’s Disease, 2012–2022

What Do the Physicians Think?

Physicians state that dyskinesia remains a major unmet need and stress the impact that an anti-dyskinetic medication would have on the treatment of Parkinson’s disease.

“Let’s say if we do not consider what is untreated today [balance, falls, dementia], then the main challenge is probably treating dyskinesia.”

[EU] KOL, November 2013

“Wearing-off wouldn’t be a problem, if the patients do not develop severe dyskinesia. Because if you can control dyskinesia, then you can use the drug [at a] high enough [dose] to control any motor fluctuation. So wearing-off itself, it’s easier to treat. The problem is most patients with wearing-off, they do have dyskinesia too, and when you try to adjust the dose in order to control wearing-off, then the patient may develop dyskinesia, or a worsening form of dyskinesia.”

[EU] KOL, November 2013

“I think sometimes we’re a bit dismissive in saying we don’t see the motor complications that we used to see, and I think that’s true, because we’ve got a range of different drugs. But, some people are really still struggling. Twenty percent of the day they’re OFF, [while] twenty percent of the day they’re dyskinetic. That’s forty percent of the day that’s bad for them, and we say, ‘well, it’s not as bad as the bad ol’ days,’ but it’s still pretty bad for them… We still don’t really have an oral drug that is anti-dyskinetic.”

[EU] KOL, October 2013
Executive Summary

“The most challenging [unmet need]… Every day I see a few patients for whom treatment is very challenging to me, particularly patients with marked wearing-off, with dyskinesia during ON, it’s very difficult to treat with the current medication. If they are eligible for deep brain stimulation, it’s okay, but patients over [age] 75, with marked wearing-off, dyskinesia, falling down, and freezing, it’s very difficult to treat. And it’s very challenging.”

[OUS] KOL, November 2013

Physicians believe that the introduction of slow-release levodopa will have a significant impact on the market and be preferred over immediate-release formulations.

“Extended-release levodopa will take the place of regular drugs [immediate-release levodopa]. Even in the early phase of the disease, they are better for patients and will reduce the amount of fluctuations in later disease, as they progress. If they [slow-release levodopa therapies] were available, I would prescribe them over the immediate-release formulations [in early stage].”

[OUS] KOL, November 2013

“If extended release of levodopa are available we may choose such agents as initial therapies, not only in advanced cases but as initial therapy.”

[OUS] KOL, November 2013

Current therapeutic options are limited to symptomatic control and do not treat the underlying disease. Although there are no late-stage therapies that will be launched to meet this need during the forecast period, physicians believe that early pipeline agents hold the promise of becoming one of the most significant advancements for PD in recent history.

“At this point, it’s not [enough] to show that you can have an improvement of one hour of time. It’s interesting, and it should be the first step. But we [are] wait[ing] for the next step; we [are] wait[ing] for drugs that have disease-modifying properties. Meaning that if we take [these drugs], we can have a better fate than not having these drugs for six month[s] or one year… I’m afraid that if a drug could arrive on the market, it will not have a huge impact if it just [demonstrates] symptomatic improvement of one hour of time.”

[EU] KOL, November 2013

“Current treatment options are all symptomatic treatments, therefore many people want to discover disease-modifying treatments for Parkinson’s disease, but none have been successful yet.”

[OUS] KOL, November 2013
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Introduction

2 Introduction

2.1 Catalyst

The Parkinson’s disease market is expected to grow from $3.6 billion to $5.3 billion over the 10-year forecast period. A major driving force behind this is the increase in the global population and advancements in healthcare that contribute to an aging population at increased risk for Parkinson’s disease. The population of Parkinson’s disease patients is expected to increase from 3.2 million people in 2012 to 4.3 million in 2022 in the eight major markets covered. The market for Parkinson’s disease is expected to grow as it is the second most common neurological disorder, with an increased prevalence in the elderly.

Parkinson’s disease has had a history of successful drugs that are highly effective; however, unmet needs remain. Advancements in technology and drug delivery systems have driven growth in this market during the forecast period and made it a less risky market than other neurological conditions, while still holding potential for a big payout. While all products to this point have treated the signs and symptoms of Parkinson’s disease rather than the underlying condition, the growing understanding of the nervous system holds promise for a breakthrough in the development of disease-modifying agents. Ample opportunity in the Parkinson’s disease market remains. As most products have been launched by collaborative efforts of at least two companies, we expect such strategic partnerships to continue during the coming decade in the market for Parkinson’s disease.

2.2 Related Reports


Introduction

- GlobalData (2014). Madopar (Parkinson’s Disease) - Forecast and Market Analysis to 2022, March 2014, GDHC389DFR
- GlobalData (2014). Sinemet (Parkinson’s Disease) - Forecast and Market Analysis to 2022, March 2014, GDHC390DFR
- GlobalData (2014). Duodopa (Parkinson’s Disease) - Forecast and Market Analysis to 2022, March 2014, GDHC391DFR
- GlobalData (2014). Stalevo/Comtan (Parkinson’s Disease) - Forecast and Market Analysis to 2022, March 2014, GDHC392DFR
- GlobalData (2014). Neupro (Parkinson’s Disease) - Forecast and Market Analysis to 2022, March 2014, GDHC393DFR
- GlobalData (2014). Requip/Requip XL (Parkinson’s Disease) - Forecast and Market Analysis to 2022, March 2014, GDHC394DFR
- GlobalData (2014). Apokyn (Parkinson’s Disease) - Forecast and Market Analysis to 2022, March 2014, GDHC395DFR
- GlobalData (2014). Azilect (Parkinson’s Disease) - Forecast and Market Analysis to 2022, March 2014, GDHC396DFR
- GlobalData (2014). Nouriast (Parkinson’s Disease) - Forecast and Market Analysis to 2022, March 2014, GDHC397DFR
- GlobalData (2014). Safinamide (Parkinson’s Disease) - Forecast and Market Analysis to 2022, March 2014, GDHC398DFR
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- GlobalData (2014). Tozadenant (Parkinson's Disease) - Forecast and Market Analysis to 2022, March 2014, GDHC399DFR
- GlobalData (2014). CVT-301 (Parkinson's Disease) - Forecast and Market Analysis to 2022, March 2014, GDHC400DFR
- GlobalData (2014). Rytary/IPX066 (Parkinson's Disease) - Forecast and Market Analysis to 2022, March 2014, GDHC401DFR
- GlobalData (2014). Opicapone (Parkinson's Disease) - Forecast and Market Analysis to 2022, March 2014, GDHC402DFR
- GlobalData (2014). Mavoglurant/AFQ056 (Parkinson's Disease) - Forecast and Market Analysis to 2022, March 2014, GDHC403DFR
- GlobalData (2014). CD/LD-GR (Parkinson's Disease) - Forecast and Market Analysis to 2022, March 2014, GDHC404DFR
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5.7 About GlobalData

GlobalData is a leading global provider of business intelligence in the Healthcare industry. GlobalData provides its clients with up-to-date information and analysis on the latest developments in drug research, disease analysis, and clinical research and development. Our integrated business intelligence solutions include a range of interactive online databases, analytical tools, reports and forecasts. Our analysis is supported by a 24/7 client support and analyst team.

GlobalData has offices in New York, Boston, London, India and Singapore.

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