



HEALTHCARE

The CNS Market Outlook to 2012

By Revati Nehru

 [Table of Contents](#)

Revati Nehru

Revati Nehru is an independent healthcare analyst with four years' experience in pharmaceutical research and advisory services. Her core focuses is on major therapy areas including CNS and cardiovascular disorders, and women's health. Revati holds a Master's degree in International Healthcare Management, Economics and Policy from SDA Bocconi, Milan.

Copyright © 2007 Business Insights Ltd
This Management Report is published by Business Insights Ltd. All rights reserved.
Reproduction or redistribution of this Management Report in any form for any purpose is expressly prohibited without the prior consent of Business Insights Ltd.

The views expressed in this Management Report are those of the publisher, not of Business Insights. Business Insights Ltd accepts no liability for the accuracy or completeness of the information, advice or comment contained in this Management Report nor for any actions taken in reliance thereon.

While information, advice or comment is believed to be correct at the time of publication, no responsibility can be accepted by Business Insights Ltd for its completeness or accuracy.

Table of Contents

The CNS Market Outlook to 2012

Executive Summary	12	
Patient potential	12	
Global market analysis	13	
Pipeline analysis	14	
Competitive landscape	15	
Chapter 1	Epidemiology of CNS disorders	18
Summary		18
Introduction		19
Alzheimer's disease		21
Overview		21
Diagnosis, treatment and management		22
Epidemiology		25
Forecast epidemiology		27
Major depressive disorder (MDD)		28
Overview		28
Diagnosis, treatment and management		30
Epidemiology		33
Forecast epidemiology		34
Schizophrenia		35
Overview		35
Diagnosis, treatment and management		36
Epidemiology		38
Forecast epidemiology		39
Migraine		41
Overview		41
Diagnosis, treatment and management		42
Epidemiology		43
Forecast epidemiology		45
Epilepsy		46
Overview		46
Diagnosis, treatment and management		46
Epidemiology		47

Forecast epidemiology	48
Parkinson's disease	50
Overview	50
Diagnosis, treatment and management	51
Epidemiology	53
Forecast epidemiology	54

Chapter 2 Global market analysis 58

Summary	58
Introduction	59
Market analysis by country	59
Licensing/generics trends	60
Market analysis by indication	61
Leading brands dynamics	65
Key events in the CNS disorders market,	68
Revised suicidal warning labeling for SSRI anti depressants	68
Increased risk of bone fractures associated with the use of SSRIs	68
Launch of Lyrica (pregabalin) as a replacement product for Pfizer's Neurontin (gabapentin)	68
US FDA calls for voluntary withdrawal of all pergolide-based products	69
Launch for first transdermal patch formulation of Novartis' Exelon for the treatment of AD	69
Arrival of generic competition to key products in the CNS market in 2005-6	69
Depression	71
Market analysis by drug class	71
Competitive dynamics of anti-depressants	72
Leading brands in the Anti-depressants market	73
Selective Serotonin Reuptake Inhibitors (SSRIs)	74
Market dynamics	75
Key brands analysis	76
Selective Norepinephrine Reuptake Inhibitors (SNRIs)	85
Key brands analysis	86
Others	90
Anti-depressants sales forecasts to 2012	93
Alzheimer's disease	94
Market analysis by drug class	94
Competitive dynamics of subclasses of anti-Alzheimer's disease	96
Leading brands in the Anti-Alzheimer's market	97
Cholinesterase inhibitors market analysis	98
Market dynamics	99
Key brands analysis	99
NMDA receptor antagonists	106
Market dynamics	106
Key brands analysis	106
Anti-Alzheimer's drugs sales forecasts to 2012	109

Epilepsy	110
Market analysis by drug class	110
Competitive dynamics of subclasses of anti-epileptics	111
Leading brands in the anti-epileptic market	112
Traditional anti-epileptics	113
Market dynamics	114
Key brands analysis	114
Second generation anti-epileptics market analysis	120
Market dynamics	120
Key brands analysis	120
Anti-epileptics sales forecasts to 2012	128
Migraine	129
Market analysis by drug class	129
Leading brands of anti migraine drugs	130
Triptans	131
Key brands analysis	132
Anti-migraine sales forecasts to 2012	141
Parkinson's disease	142
Market analysis	142
Leading brands in the anti Parkinson's market Table 2.30 summarizes the performance of the leading anti-Parkinson's disease brands in 2005-6	143
COMT inhibitors	145
Key brands analysis	146
Dopaminergics	148
Key brands analysis	149
Dopamine Agonists	150
Key brands analysis	151
Anti-Parkinson's drugs sales forecasts to 2012	158
Schizophrenia	159
Market analysis	159
Leading brands in the Schizophrenia market	161
Typical anti-psychotics	163
Atypical antipsychotics	163
Key brands analysis	164
Schizophrenia drugs sales forecasts to 2012	180
Total CNS disorders' sales forecasts to 2012	181

Chapter 3 Pipeline analysis 185

Summary	185
Introduction	186
Key trends in R&D	186
New class of drugs	187
Dual mechanism of action	188
Combination drugs	188
New drug delivery formulations	188

The CNS disorders pipeline	190
Leading drugs in development	192
Profiles of key pipeline products	193
Phase II compounds	193
Ketasyn/AC-1202	193
PBT2 (Metal Protein Attenuating Compound)	195
Phase III compounds	197
vilazodone	197
ACP 103 (pimavanserin)	199
MK-0974	202
safinamide	204
Drugs in registration	206
DVS-233 (desvenlafaxine)	206
Trexima (sumatriptan/naproxen)	208
Vimpat (lacosamide)	210
Recently marketed drugs	212
Invega (paliperidone)	212
Neupro (rotigotine transdermal patch)	214
Inovelon (rufinamide)	217
Pipeline forecasts	220
CNS disorders pipeline forecasts	220

Chapter 4 Competitive landscape 223

Summary	223
Introduction	224
Company market shares	224
Johnson & Johnson	228
Overview	228
Sales focus by indication	228
Marketed product portfolio	229
R&D pipeline analysis	231
Strategic and growth analysis	232
Sales and Promotion analysis	232
Drivers of growth	233
Resistors of growth	233
Glaxo SmithKline	234
Overview	234
Sales focus by indication	234
Marketed product portfolio	235
R&D pipeline analysis	237
Strategic and growth analysis	239
Sales and Promotion analysis	239
Drivers of growth	240
Resistors of growth	240

Pfizer	240
Overview	240
Sales focus by indication	241
Marketed product portfolio	242
R&D pipeline analysis	244
Strategic and growth analysis	245
Sales and Promotion analysis	245
Drivers of growth	246
Resistors of growth	246
Lilly	247
Overview	247
Sales focus by indication	247
Marketed product portfolio	248
R&D pipeline analysis	249
Strategic and growth analysis	250
Sales and Promotion analysis	250
Drivers of growth	250
Resistors of growth	251
Sanofi Aventis	252
Overview	252
Sales focus by indication	252
Marketed product portfolio	253
R&D pipeline analysis	254
Strategic and growth analysis	255
Sales and Promotion analysis	255
Drivers of growth	256
Resistors of growth	256
Novartis	257
Overview	257
Sales focus by indication	257
Marketed product portfolio	258
R&D pipeline analysis	259
Strategic and growth analysis	260
Sales and Promotion analysis	260
Drivers of growth	261
Resistors of growth	261
AstraZeneca	262
Overview	262
Sales focus by indication	262
Marketed product portfolio	263
R&D pipeline analysis	264
Strategic and growth analysis	265
Sales and Promotion analysis	265
Drivers of growth	266
Resistors of growth	266
Wyeth	267
Overview	267
Sales focus by indication	267
Marketed product portfolio	268

R&D pipeline analysis	269
Strategic and growth analysis	270
Sales and Promotion analysis	270
Drivers of growth	271
Resistors of growth	271
Forest Labs	272
Overview	272
Sales focus by indication	272
Marketed product portfolio	273
R&D pipeline analysis	274
Sales and Promotion analysis	275
Drivers of growth	275
Resistors of growth	276

Chapter 5 Appendix 279

IMS data	279
N1 Anaesthetics - Includes Anaesthetics local, others	279
N2 Analgesics	279
Index	280

List of Figures

Figure 1.1:	Typical treatment patterns in the treatment of Alzheimer's disease	25
Figure 1.2:	Typical treatment patterns in the treatment of MDD	32
Figure 1.3:	Typical treatment patterns in the treatment of schizophrenia	38
Figure 1.4:	Typical treatment patterns in the treatment of PD	52
Figure 2.5:	Global CNS market share by geography, 2006	59
Figure 2.6:	Sales of types of CNS disorder brands, 2005-06	60
Figure 2.7:	Competitive dynamics of the global CNS market by indication, 2006	64
Figure 2.8:	Competitive dynamics of the leading 10 brands in the global CNS market, 2006	67
Figure 2.9:	Competitive dynamics of the global anti-depressant market, 2005-6	72
Figure 2.10:	Competitive dynamics of the global AD market, 2005-6	96
Figure 2.11:	Competitive dynamics of the global AED market, 2005-6	111
Figure 2.12:	Competitive dynamics of the global schizophrenia market, 2005-6	160
Figure 3.13:	Prevailing R&D approaches, 2006	186
Figure 3.14:	The CNS pipeline by indication and stage of development, 2006	190
Figure 3.15:	Leading recently launched products and late-stage R&D compounds indicated for the treatment of CNS disorders, 2006	192
Figure 4.16:	Competitive dynamics of the leading players in the global CNS market, 2006	227
Figure 4.17:	J&J's CNS portfolio sales by indication, 2006	228
Figure 4.18:	GSK's CNS portfolio sales by indication, 2006	234
Figure 4.19:	Pfizer's CNS portfolio sales by indication, 2006	241
Figure 4.20:	Lilly's CNS portfolio sales by indication, 2006	247
Figure 4.21:	Sanofi Aventis' CNS portfolio sales by indication, 2006	252
Figure 4.22:	Novartis' CNS portfolio sales by indication, 2006	257
Figure 4.23:	AstraZenca's CNS portfolio sales by indication, 2006	262
Figure 4.24:	Wyeth's CNS portfolio sales by indication, 2006	267
Figure 4.25:	Forest Labs' CNS portfolio sales by indication, 2006	272

List of Tables

Table 1.1:	Estimated prevalence of CNS disorders across the seven major pharmaceutical markets, 2006	20
Table 1.2:	Estimated prevalence of Alzheimer's disease across seven major markets, 2006	26
Table 1.3:	Forecast epidemiology of AD across the seven major markets, 2006-12	27
Table 1.4:	Estimated prevalence of MDD across seven major markets, 2006	33
Table 1.5:	Forecast epidemiology of MDD across the seven major markets, 2006-12	34
Table 1.6:	Estimated prevalence of schizophrenia across seven major markets, 2006	39
Table 1.7:	Forecast epidemiology of schizophrenia across seven major markets, 2006	40
Table 1.8:	Estimated prevalence of migraine across seven major markets, 2006	44
Table 1.9:	Forecast epidemiology of migraine across seven major markets, 2006	45
Table 1.10:	Estimated prevalence of epilepsy across seven major markets, 2006	48
Table 1.11:	Forecast epidemiology of epilepsy across seven major markets, 2006	49

Table 1.12:	Estimated prevalence of PD across seven major markets, 2006	53
Table 1.13:	Forecast epidemiology of PD across seven major markets, 2006	54
Table 2.14:	Breakdown of the global CNS market by indication, 2002-06	61
Table 2.15:	Leading brands in the global CNS disorders market, 2005-06	65
Table 2.16:	Breakdown of the global anti-depressant market by drug class, 2002-06	71
Table 2.17:	Leading anti-depressant products in the global CNS market, 2005-06	73
Table 2.18:	Leading SSRI brands in the global CNS market, 2005-06	75
Table 2.19:	Anti-depressants sales forecast, 2006-12	93
Table 2.20:	Breakdown of the global anti-Alzheimer's market by drug class, 2002-06	94
Table 2.21:	Leading AD products in the global CNS market, 2005-06	97
Table 2.22:	Anti-AD products' sales forecast, 2006-12	109
Table 2.23:	Breakdown of the global Epilepsy market by drug class, 2002-06	110
Table 2.24:	Leading AED products in the global CNS market, 2005-06	112
Table 2.25:	Anti-epileptics' sales forecast, 2006-12	128
Table 2.26:	Breakdown of the global migraine market by drug class, 2002-06	129
Table 2.27:	Leading anti migraine products in the global CNS market, 2005-06	130
Table 2.28:	Anti-migraine products' sales forecast, 2006-12	141
Table 2.29:	Breakdown of the global anti-PD market by drug class, 2002-06	142
Table 2.30:	Leading brands in the global PD market, 2005-06	143
Table 2.31:	Anti-PD products' sales forecast, 2006-12	158
Table 2.32:	Breakdown of the global schizophrenia market by drug class, 2002-06	159
Table 2.33:	Leading products in the global schizophrenia market, 2005-06	161
Table 2.34:	Schizophrenia products' sales forecast, 2006-12	180
Table 2.35:	CNS market sales forecasts by drug class, 2006-12	181
Table 3.36:	CNS disorders pipeline forecasts, 2007-12	220
Table 4.37:	Leading players in the global CNS disorders market, 2005-6	224
Table 4.38:	J&J's CNS product portfolio, 2005-6	229
Table 4.39:	J&J's CNS R&D product pipeline, 2006	231
Table 4.40:	Promotional spends on major drugs by J&J, 2005-06	232
Table 4.41:	GSK's CNS product portfolio, 2005-06	235
Table 4.42:	GSK's CNS R&D product pipeline, 2006	237
Table 4.43:	Promotional spends on major drugs by GSK, 2005-06	239
Table 4.44:	Pfizer's CNS product portfolio, 2005-6	242
Table 4.45:	Pfizer's CNS R&D product pipeline, 2006	244
Table 4.46:	Promotional spends on major drugs by Pfizer, 2005-06	245
Table 4.47:	Lilly's CNS product portfolio, 2005-6	248
Table 4.48:	Lilly's CNS R&D product pipeline, 2006	249
Table 4.49:	Promotional spends on major drugs by Lilly, 2005-06	250
Table 4.50:	Sanofi Aventis' CNS product portfolio, 2005-6	253
Table 4.51:	Sanofi Aventis' CNS R&D product pipeline, 2006	254
Table 4.52:	Promotional spends on major drugs by Sanofi Aventis, 2005-06	255
Table 4.53:	Novartis' CNS product portfolio, 2005-6	258
Table 4.54:	Novartis' CNS R&D product pipeline, 2006	260
Table 4.55:	Promotional spends on major CNS drugs by Novartis, 2005-06	260
Table 4.56:	AstraZeneca's CNS product portfolio, 2005-6	263
Table 4.57:	AstraZeneca's CNS R&D product pipeline, 2006	264
Table 4.58:	Promotional spends on major CNS drugs by AstraZeneca, 2005-06	265
Table 4.59:	Wyeth's CNS product portfolio, 2005-6	268
Table 4.60:	Wyeth's CNS R&D product pipeline, 2006	269
Table 4.61:	Promotional spends on major CNS drugs by Wyeth, 2005-06	270
Table 4.62:	Forest Lab's CNS product portfolio, 2005-6	273
Table 4.63:	Forest Lab's CNS R&D product pipeline, 2006	274
Table 4.64:	Promotional spends on major CNS drugs by Forest, 2005-06	275