

# Frontier Pharma Asthma Pharmaceutical and Healthcare Pipeline Review H2

*Global Frontier Pharma Asthma Drugs and Companies Pipeline Review H2 2016*

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## Summary

Asthma is a chronic condition affecting the respiratory system, with disease

occurrence linked to both genetic and environmental factors. It has significant global incidence and there is currently no cure. Pharmacotherapeutic intervention aims to provide patients with an increased level of disease control and reduce the severity of symptoms, and a number of inhalational therapeutic options are available. Current asthma treatment options are able to provide the majority of patients with a sufficient level of disease control. Additionally, scientific advancements through the development of combination and add-on therapeutics have provided patients with treatments that allow for a greater level of disease control. However, unmet need remains, in the form of patients that do not respond well to current therapeutics or therapeutic combinations. This group of patients accounts for the vast majority of global healthcare costs associated with asthma. Pipeline product development aims to improve upon current therapeutic options and provide options for satisfactory disease control to patients with unmet needs. This is reflected in the high number of products in development, with 287 pipeline products, accounting for just over a third of products within the broader respiratory therapy area pipeline. There are a total of 93 first-in-class pipeline products in development for asthma, representing a substantial 44% of the 212 pipeline products for which there is a disclosed molecular target. A number of these first-in-class pipeline programs appear to have significant potential to strengthen the asthma treatment landscape – as well as representing promising commercial opportunities. A large number of first-in-class products in the current asthma pipeline have not previously been involved in licensing or co-development deals. This highlights the significant opportunities in the asthma pipeline, and the many possibilities for high-risk,



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high-reward investment.

## Scope

- Analysis of innovation in the asthma market in the context of the overall pipeline and current market landscape – also includes analysis of the deals landscape surrounding first-in-class products in asthma, and highlights opportunities for in-licensing
- A brief introduction to asthma, including symptoms, pathophysiology, and an overview of pharmacotherapy
- The changing molecular target landscape between the market and the pipeline, and particular focal points of innovation in the pipeline
- Comprehensive review of the pipeline for first-in-class therapies, analyzed on the basis of stage of development, molecule type and molecular target
- Identification and assessment of first-in-class molecular targets, with a particular focus on early-stage programs for which clinical utility has yet to be evaluated, as well as literature reviews on novel molecular targets
- Assessment of the licensing and co-development deal landscape for asthma therapies, and benchmarking of deals involving first-in-class versus non-first-in-class-products

## Reasons to buy

- Understand the current clinical and commercial landscape by considering disease pathogenesis, diagnosis, prognosis, and the treatment strategies currently available.
- Visualize the composition of the asthma market in terms of the dominant classes of therapies. Unmet needs are highlighted to allow a competitive understanding of current gaps in the market.
- Analyze the asthma pipeline and stratify pipeline therapies by stage of development, molecule type and molecular target. There are signs in the pipeline that the industry is seeking novel approaches to meet unmet needs within asthma.
- Assess the therapeutic potential of first-in-class targets. Using a proprietary matrix, first-in-class products have been assessed and ranked according to clinical potential. Promising early-stage targets have been further reviewed in greater detail.
- Identify commercial opportunities in the asthma deals landscape by analyzing trends in licensing and co-development deals and assessing asthma therapies that are not yet involved in deals, and may be potential investment opportunities.

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