

Anti-Hypertensive Pharmaceutical and Healthcare Pipeline Review H2

Anti-Hypertensive Treatment Pipeline Review H2 2016

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Summary

Anti-Hypertensive is a serious and common medical condition characterized by elevated blood pressure. It is commonly seen in the aging population, and in people with sedentary lifestyles and obesity. As one of the most significant preventable causes of death worldwide, early diagnosis of the condition is crucial to improve health outcomes. Anti-Hypertensive is the key risk factor for stroke; according to the National Stroke Association (NSA), two-thirds of patients who suffer a stroke have Anti-Hypertensive.

Anti-Hypertensive itself does not manifest any symptoms, but direct damage can occur to various organs due to high blood pressure. In cases of hypertensive emergency (where blood pressure is higher than 180/110mmHg) patients have reported headaches, breathlessness or malaise due to heart failure and kidney failure. Whether symptomatic or asymptomatic, Anti-Hypertensive requires attention and appropriate changes in lifestyle or medical treatment

The marketed products landscape for Anti-Hypertensive comprises a wide range of treatment options, which includes angiotensin converting enzyme inhibitors, angiotensin receptor blockers, calcium channel blockers, beta blockers, renin inhibitors, and diuretics. These are used both as monotherapy and combination therapy (including fixed-dose combinations), and the proportion of patients treated using the various therapy approaches varies from country to country.

The high prevalence of the disease is a substantial contributor to healthcare costs and is a major cause of morbidity. However, awareness of Anti-Hypertensive is low among physicians, patients, and the public, leading to a high level of undiagnosed and untreated cases.

Scope

The Asia-Pacific antihypertensive market will be valued at \$27 billion in 2022, growing from \$19.1 billion in 2015 at a CAGR of 5.1%. Anti-Hypertensive prevalence is a prominent contributor to market size in the assessed countries. The market is mostly dominated by generics, and there are only a few patented products.

- Will generics continue to dominate treatment?
- How do the elderly populations and their associated risk factors affect prevalence?
- What effect will the patent expirations of currently branded therapies have on market value?

The current anti-hypertensive therapeutics pipeline is weak, comprising 112 molecules in various



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stages of development, dominated by small molecules.

- Which molecular targets appear most frequently in the pipeline?

- Is there potential for the pipeline to address unmet needs within the anti-hypertensive market?

Analysis of clinical trials since 2006 identified that anti-hypertensive products have a high rate of attrition.

- How do failure rates vary by product stage of development, molecule type, and mechanism of action?

- How do other factors such as average trial duration and trial size influence the costs and risks associated with product development?

The market forecasts indicate that Japan will contribute the most to the Asia-Pacific market value, due to the high annual cost of therapy. Growth in market size is projected to vary considerably across the five assessed markets.

- How will the annual cost of therapy and market size vary between the five Asia-Pacific markets?

- How could changes in risk factors such as aging population, metabolic disorders and high salt intake influence the market?

- Various drivers and barriers will influence the market over the forecast period.

- What are the barriers that limit the uptake of premium-priced therapeutics in the assessed countries?

- Which factors are most likely to drive the market in these countries?

Reasons to buy

This report will allow you to -

- Understand the current clinical and commercial landscape by considering disease pathogenesis, diagnosis, prognosis, and the treatment options available at each stage of diagnosis, including a clinical comparison of marketed therapies.

- Visualize the composition of the anti-hypertensive market in terms of the dominant therapies, and their clinical and commercial standing. Unmet needs are highlighted to allow a competitive understanding of gaps in the market.

- Analyze the anti-hypertensive pipeline and stratify pipeline therapies by stage of development, molecule type and molecular target.

- Consider market opportunities and potential risks by examining trends in Anti-Hypertensive clinical trial size, duration, and failure rate by stage of development, molecule type, and mechanism of action.

- Predict anti-hypertensive market growth in the five Asia-Pacific markets with epidemiological and annual cost of therapy forecasts across India, China, Australia, South Korea and Japan. The forecasts will provide an understanding of how epidemiology trends, new drug entries, and patent expirations will influence market value.

- Identify commercial opportunities in the anti-hypertensive deals landscape by analyzing trends in licensing and co-development deals.

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