

Attention Deficit Hyperactivity Disorder Pharmaceutical and Healthcare Pipeline Review H2

*PharmaPoint: Attention Deficit
Hyperactivity Disorder (ADHD) - Global
Drug Forecast and Market Analysis to
2024*

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Hyperactivity Disorder \(ADHD\) - Global
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Summary

Attention deficit hyperactivity disorder (ADHD) is characterized by excessive levels of inattention, impulsivity, and hyperactivity, either alone or in combination that have a significant social impact through disruptions at school, work, home, and in relationships. The majority of children with the disorder will continue to experience symptoms into adolescence. 30-50% of children diagnosed with ADHD continue to have problems into adulthood resulting in 2--5% of adults having ADHD.

Growth is expected in the global ADHD marketplace, despite the market being widely genericized. This will be driven largely by the anticipated launch of assets from the heavily populated ADHD pipeline, as these products offer clinical advantages that will drive strong uptake. Furthermore, the number of drug-treated patients will increase over the forecast period, driven by increased treatment rates throughout the 7MM, particularly in the adult age group.

Highlights

- The ADHD market has been dominated by stimulant therapy, with only three approved non-stimulant drugs approved that cannot compete with stimulant drugs in terms of efficacy. Due to lack of evidence for long-term safe use of stimulants, non-stimulants are becoming increasingly popular in the 7MM. Both stimulant and non-stimulant therapies are anticipated to reach the market within the forecast period. How will these change the market overall during the forecast period? Will stimulants maintain market dominance in 2024?
- The current late stage ADHD pipeline is heavily populated, drugs designed to satisfy what GlobalData has identified as unmet needs. Which of these will have the biggest impact on the market? What strategies are developers undertaking to penetrate this crowded market?



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- ADHD is becoming increasingly recognized, particularly in the adult population, leading to increase number in treated patients across the 7MM. How will these changes impact the growth of the future market?

Key Findings

- The main driver of growth in the ADHD market will be the increase in the number of drug-treated patients, driven by an increase in treatment rates expected to 2024, particularly in the adult age group.
- Lack of awareness and recognition of ADHD leads to misdiagnosis; this has acted as a barrier to appropriate treatment for ADHD.
- The arrival of new therapies across the 7MM will increase treatment rates and provide alternative options for many patients, particularly those who have difficulty or who dislike swallowing pills and those who choose non-stimulant therapy.
- One of the key unmet needs in the ADHD market of additional treatment options will be somewhat satisfied by the emerging pipeline assets during the forecast. Despite the increasingly competitive nature of the ADHD market, lucrative opportunities remain for products that target unmet needs. In addition, providing clinically relevant, head-to-head comparisons is an important consideration for companies developing drugs to treat these patients.

Scope

- Overview of ADHD, including epidemiology, etiology, pathophysiology, symptoms, diagnosis, and treatment guidelines.
- Annualized ADHD market revenue, annual cost of therapy and treatment usage pattern data from 2014 and forecast for ten years to 2024.
- Key topics covered include market characterization, unmet needs, R&D and clinical trials assessment, late stage clinical trial analysis and implications for the ADHD therapeutics market.
- Pipeline analysis: focus on 13 late-stage pipeline ADHD drugs discussing emerging trends as well as an overview of earlier phase drugs.
- Analysis of the current and future market competition in the global ADHD therapeutics market. Insightful review of the key industry drivers, restraints and challenges. Each trend is independently researched to provide qualitative analysis of its implications.

Reasons to buy

The report will enable you to -

- Develop and design your in-licensing and out-licensing strategies through a review of pipeline products and technologies, and by identifying the companies with the most robust pipeline. Additionally a list of acquisition targets included in the pipeline product company list.
- Develop business strategies by understanding the trends shaping and driving the global ADHD therapeutics market.
- Drive revenues by understanding the key trends, innovative products and technologies, market segments, and companies likely to impact the global ADHD therapeutics market in future.
- Formulate effective sales and marketing strategies by understanding the competitive landscape and by analysing the performance of various competitors.
- Identify emerging players with potentially strong product portfolios and create effective counter-strategies to gain a competitive advantage.
- Track drug sales in the global ADHD therapeutics market from 2014-2024.
- Organize your sales and marketing efforts by identifying the market categories and segments that present maximum opportunities for consolidations, investments and strategic partnerships.

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