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Global Ophthalmology Drugs Market to 2023 - Angiogenesis Inhibitors in wAMD Set to Retain High Market Share, While Expansive Pipeline for Glaucoma Leads the Research Landscape

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Description:

Global Ophthalmology Drugs Market to 2023 - Angiogenesis Inhibitors in wAMD Set to Retain High Market Share, While Expansive Pipeline for Glaucoma Leads the Research Landscape

Summary

Ophthalmology is a broad therapy area that consists of almost 100 disorders associated with the eyes and visual system, including such diseases as glaucoma, age-related macular degeneration (AMD), diabetic macular edema (DME), diabetic retinopathy (DR) and dry eye syndrome (DES). Many of these disorders are progressive, and if left untreated can lead to severe visual impairment or even blindness.

The patents protecting the three most commercially successful products, all marketed in wet AMD, are expected to expire in the coming years - Lucentis (ranibizumab) and Avastin (Bevacizumab) in 2018, and Eylea (aflibercept) in 2020. However, revenue from anticipated new approvals such as lampalizumab in dry AMD, Fovista (pegpleranib sodium) in wet AMD and brolucizumab in wet AMD and DME is expected to exceed the revenue lost following the patent expiry of current market leaders.

There is also significant interest in developing products for other indications; in 2017, Spark Therapeutics is expected to gain FDA approval in retinitis pigmentosa and Leber congenital amaurosis for its orphan drug, Voretigene Neparvovec, which if successful will be the first gene therapy approved for any genetic disease.

At the same time, a number of small and specialized ophthalmology companies such as Santen and Aerie are expected to enter the market, diversifying the landscape, which currently consists primarily of large biotech companies.

Scope

- The ophthalmology therapeutics market is forecast to reach $35 billion in 2023. What are the key market segments driving this growth?
- The pipeline contains over 800 products. What molecule types and molecular targets are in the pipeline? What are the commercial prospects of promising late-stage products?
- Despite specific drug classes such as angiogenesis inhibitors dominating the commercial landscape, there is a very high proportion of novel drug classes in the pipeline. Which drug classes account for the largest proportion of early-stage development, and how do clinical failure rates, clinical trial size and clinical trial duration differ by indication and molecular target?
- Although they are dominant in the market, large biotech companies are anticipated to lose market share to specialty ophthalmology companies, which are much more active in the pipeline. Which of

the leading companies will have the highest market share by 2023? Which new companies will enter the market?
- What licensing and co-development deals have occurred within this therapy area since 2006?

Reasons to buy

- Understand the current clinical and commercial landscape through a comprehensive analysis of innovation in the ophthalmology therapeutics market, in the context of the overall pipeline and current market landscape. The report also includes analysis of the deals landscape, including both licensing deals and co-development deals. Key indications covered in detail include glaucoma, AMD, DME, DR and DES.
- Understand the current treatment landscape, with profiles of key marketed products and a focus on historical and forecast sales patterns, and an overview of each drug’s mechanism of action.
- Analyze the ophthalmology therapeutics pipeline through a comprehensive review, segmented by stage of development, molecule type and molecular target. This review also provides a detailed look at ophthalmology therapeutics clinical trials, to provide an insight into the risk associated with attempting to bring pipeline analgesics to market.
- Predict growth in market size, with in-depth market forecasting from 2016 to 2023. The forecast will provide an understanding of how epidemiology trends, new drug entries and new drug patent expirations will influence market value.
- Identify the key pipeline products, with a particular focus on those due to be brought to market in the near future, as well as sales forecasts for these products.
- Identify the leading companies in the market, in terms of market share and growth. Company analysis determines how dependent the key companies in the market are on revenue derived from ophthalmology therapeutic products. In addition, analysis determines the primary factors that will drive market growth for the disease area’s key companies.
- Assess the licensing and co-development deal landscape for ophthalmology therapies.

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Drug Pipeline

No. 1101, Golden Square, 3rd Floor,
24th Main, J P Nagar, 1st Phase,
Bangalore, Karnataka, India- 560078

India: +91-8762746600

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