



US Neuropathic Pain Market Value Doubles to \$5 Billion by 2018 New Indications and Products Offset Patent Expirations

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SAN FRANCISCO, September 11, 2008 /PRNewswire/ – The U.S. market for drug treatment of major neuropathic pain (NP) conditions is currently valued at \$2.6 billion, according to US Neuropathic Pain, a report released today by WWMR, Inc. Growth over the past four years has been driven largely by the successful launch of Lyrica (pregabalin) for diabetic neuropathic pain and post-herpetic neuralgia in December 2004 along with its 2007 approval for fibromyalgia, as well as the launch of Lilly's Cymbalta (duloxetine) for diabetic neuropathic pain in 2004. The additional June 2008 approval of Cymbalta for fibromyalgia will spur penetration of this prevalent condition.

Based on a decade of experience tracking and forecasting the NP Market, WWMR predicts healthy growth over the next 5 years due to penetration of the market for fibromyalgia. Two yet to be launched products, Forest Laboratories/Cypress Biosciences's antidepressant milnacipran and Schwarz Pharma's sodium ion channel antagonist/CRMP2 modulator lacosamide (Vimpat), will compete for market share as well as provide the benefit of an additional mechanism of action. Growth will slow between 2013 and 2018 as Lyrica and Cymbalta patents expire, and the fibromyalgia market penetration becomes saturated. Additional launch of novel compounds and new brands of existing drug classes will be required in order to sustain market growth.

The US neuropathic pain market consists of 4.7 million patients, and is expected to grow to more than 6.1 million patients, and be valued at \$5.1 billion in 2018. With the addition of two key new indications to this report (Fibromyalgia and Neuropathic Cancer Pain) patient population estimates and projections as well as market value and projections, are available for a total of ten Neuropathic Pain Conditions (neuropathic back pain, fibromyalgia, diabetic neuropathy, neuropathic cancer pain, complex regional pain syndrome, HIV/AIDS neuropathy, post-herpetic neuralgia, phantom limb pain, spinal cord injury, and trigeminal neuralgia). Insights have also been added from WWMR's US Pain Clinic Monitor – an audit of more than 100 pain clinics containing prescribing and condition details on more than 5000 patients – many of whom have neuropathic pain.

Worldwide, approximately 76 agents are in active clinical trials for the treatment of neuropathic pain, and are reviewed in this report. Five new neuropathic pain treatments are currently registered or pre-registered with the FDA for NP marketing approval: lacosamide (Schwarz Pharma), milnacipran (Forest Laboratories/Cypress Bioscience), transdermal capsaicin (NeurogesX) and a dual cannabinoid receptor agonist (GW/Bayer), and fentanyl buccal (Cephalon). Eighteen drugs are in Phase III development in the US including two GABA receptor agonists pregabalin (Pfizer) and gabapentin GR (Depomed); a sodium channel antagonist mexiletine (Boehringer Ingelheim); three glutamate / NMDA antagonists ketamine intranasal (Javelin), a dextromethorphan/quinidine combination (Avanir), and NP-1 (EpiCept/Epitome); two serotonin/norepinephrine reuptake inhibitors desvenlafaxine (Wyeth), and paroxetine (GSK/Novo Nordisk); an alpha-2 adrenergic receptor antagonist/norepinephrine reuptake inhibitor reboxetine (Pfizer); an opioid receptor agonist/norepinephrine reuptake inhibitor tapentadol (Ortho-McNeil); a dopamine receptor agonist sodium oxybate (Jazz), and a neuromuscular blocking agent botulinum toxin A (Allergan). Early-phase products are also described in the full report.

ADDITIONAL SERVICES AND REPORTS BY WWMR, INC. INCLUDE:

- US Pain Clinic Monitor (available now)
- 2008 European Neuropathic Pain (coming soon)
- 2008 Japanese Neuropathic Pain (coming soon)

WWMR, Inc. is a leader in Pain Reporting, and also designs and executes research which brings clarity, reveals innovative opportunities and provides deeper understanding across many therapy areas and all phases of drug development. This enables our clients to:

- Demonstrate the commercial value of product/partnering opportunities
- Optimize the revenue potential of their product portfolio
- Identify and evaluate additional business opportunities

ABOUT WWMR, INC. (WORLDWIDE MARKETING RESEARCH):

A highly-regarded marketing research and strategic consulting firm with global capabilities. Since 1994, WWMR has provided thousands of insightful, proprietary studies to pharmaceutical, biotech, medical device, and diagnostics companies worldwide. Using primary and secondary research methodologies, WWMR provides insights on current and emerging markets using their expertise in product and technology assessments, forecast modeling, epidemiology projections, product launch monitoring (pre- and post-), primary marketing research and medical economic analyses.

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