



## ***Neuropathic Pain Products in Europe Grow to \$1.7 Billion by 2012***

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### **FOR IMMEDIATE RELEASE**

San Francisco, CA. Dec. 16, 2003 - By 2012, the market for drug treatment of major neuropathic pain conditions in the five major European pharmaceutical markets - France, Germany, Italy, Spain and the UK - will reach \$1.7 billion. Given this substantial commercial potential and a patient population approaching 2 million in Europe alone, upcoming products for the treatment of Neuropathic Back Pain, Diabetic Neuropathy, Post-Herpetic Neuralgia, Trigeminal Neuralgia, and HIV / AIDS Neuropathy are vigorously being research and developed by pharmaceutical companies.

The European neuropathic pain market is characterized by a particularly high level of unmet need for effective therapeutics due to the under-utilization of anti-depressants, the lack of opioid availability, commonly used to treat neuropathic pain in the U.S. and certain European country-markets, but not others. This under-utilization stems primarily from a lack of awareness about the potential utility of these drugs in neuropathic pain treatment and concerns about opioid addiction.

The anticonvulsant Neurontin (gabapentin) has recently experienced significant uptake in some countries in Europe, demonstrating the magnitude of the potential for other drugs with newer mechanisms of action. Now the product is facing generic competition in Europe, and with Pfizer's recent NDA submission to the US FDA for the follow-on drug pregabalin, renewed attention is being focused on anticipated changes in the neuropathic pain market.

At least 41 agents, triple the number from 1999, are in active clinical trials for the treatment of neuropathic pain worldwide. Late-phase products in clinical development for neuropathic pain include calcium channel antagonists pregabalin (Pfizer) and ziconotide (Elan Pharmaceuticals); sodium channel antagonists topiramate (J&J / Ortho-McNeil Pharmaceutical), mexiletine (Boehringer Ingelheim), and oxcarbazepine (Novartis / Kissei); glutamate / NMDA antagonists memantine (Neurobiological Technologies / Merz) and lamotrigine (GlaxoSmithKline / Bristol-Myers Squibb); cyclo-oxygenase inhibitors meloxicam (Boehringer Ingelheim/ BMS / Abbott Laboratories) and lornoxicam (Roche / Nycomed Pharma); cannabinoid receptor agonist THC:CBD (GW Pharmaceuticals / Bayer AG); neuromuscular blocking agent botulinum toxin A (Allergan); norepinephrine and serotonin reuptake inhibitor duloxetine (Lilly / Quintiles / Shinogi); and alpha adrenoceptor agonist clonidine gel (Curatek Pharmaceuticals).

**European Neuropathic Pain** is a newly released report on the market potential for pharmaceuticals to treat neuropathic pain in the five major pharmaceutical markets in Europe - France, Germany, Italy, Spain, and the United Kingdom.

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- Brand Erosion by Generics
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