



US Back Pain Market Approaches \$23 Billion in 2018 – Anticipated Long-Acting, Abuse-Resistant Opioids Drive Growth

March 2009

FOR IMMEDIATE RELEASE

SAN FRANCISCO, March 23, 2009 /PRNewswire/ – The US back pain market for drug treatment will be valued at almost \$23 billion in 2018, according to US Back Pain, a report released today by WWMR, Inc. Growth in this market will be driven largely by the opioid agonist products that are currently in development. Many of these are long-acting, abuse-resistant formulations that are highly anticipated in the clinical community. If pipeline products deliver on efficacy and safety, uptake is likely to be considerable and at premium prices.

WWMR estimates that the US back pain market in 2008 was valued at \$17 billion and dominated by opioid drugs, a trend expected to continue throughout the next decade.

Only a few of the many drugs in development for pain conditions are seeking regulatory approval for back pain; nonetheless, many agents will compete for patients and share in this market. Abuse-resistant opioids like tapentadol CR and the antidepressant duloxetine (Cymbalta) have the greatest potential for success among the new agents in late-stage development.

In 2008 an estimated 91 million people in the US suffered from either acute, chronic neuropathic or chronic non-neuropathic back pain, including pain in the neck/upper back or lower back. In the report WWMR provides prevalent US patient pool estimates (2008) and projections (2013 and 2018) for each of these five types of back pain.

WWMR also provides market value estimates for 2008 and projections to 2018 by drug class, which takes into consideration the five major causes of back pain: mechanical disorders; rheumatic disorders; spinal metabolic disorders; spinal tumors; and failed back surgery (post-laminectomy) syndrome. Interviews with primary care physicians and pain clinicians, as well as data from WWMR's US Pain Clinic Monitor provide additional perspective on the back pain market. WWMR's US Pain Clinic Monitor is an audit of more than 100 pain clinics that includes prescribing data on 27 different pain indications, including back pain.

In the development pipeline more than 170 agents worldwide have the potential to treat back pain, with 10 agents in active clinical trials specifically for the treatment of back pain. Among the 170, 60 agents are in development for indications closely related to back pain, such as musculoskeletal pain, inflammatory pain, acute pain and neuropathic pain. All of these agents are reviewed in this report. Currently, worldwide, there are 39 agents in late-stage (Phase III+) development with a potential to treat back pain. The 5 late-stage compounds that are being studied specifically for the treatment of back pain are Eli Lilly's SNRI Cymbalta, Abbott's Vicodin CR (an extended release formulation of the popular hydrocodone/APAP combination), Cephalon's Fentora, an effervescent oral formulation of fentanyl, Pfizer's Celebrex, which is seeking regulatory approval in Japan for the treatment of back pain, and Ortho-McNeil/ Grunenthal's tapentadol controlled release, an opioid receptor agonist/ norepinephrine reuptake inhibitor.

ADDITIONAL SERVICES AND REPORTS BY WWMR, INC. INCLUDE:

- US Pain Clinic Monitor (available now)
- 2008 US Neuropathic Pain (available now)
- 2008 US Cancer Pain (available now)

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.

For more information, contact:

WWMR, Inc.

2929 Campus Drive

Suite 200

San Mateo, CA 94403

Phone: (888) 947-2339

(650) 513-0300

Fax: (650) 312-1570

Web: www.WWMR.com

Email: Michelle_Nordstrom@WWMR.com