



## US Cancer Pain Market to Reach \$5 Billion by 2018 – Cancer Patient Growth Drives Value

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### FOR IMMEDIATE RELEASE

SAN FRANCISCO, February 3, 2009 /PRNewswire/ – The US market for the drug treatment of cancer pain in 2008 is valued at \$3.1 billion, according to US Cancer Pain, a report released today by WWMR, Inc. The cancer pain market is dominated by opioid drugs, a trend expected to continue throughout the next decade. The increasing number of cancer pain patients will be the primary driver of market value during the forecast period.

Few of the many drugs in development for pain conditions are seeking regulatory approval for cancer pain. Of these, most are reformulations of fentanyl or other opioids, using novel delivery devices or as combination therapies. Reformulations of existing opioids are unlikely to capture market share unless they can compete economically with older agents that are already available on payer-approved formularies.

Today, half of the 4.1 million cancer patients in the US experience pain. More than 600,000, among these, experience moderate-to-severe pain. WWMR estimates that the cancer pain market will be valued at \$5.3 billion in 2018, based on a patient population of more than 2.5 million cancer pain patients. While most pain is the result of tissue damage caused by the tumor, some cancer pain is due to the effects of chemotherapy, radiation or surgery; moreover, 25% of patients experience more than one type of cancer pain.

WWMR provides estimates for 2008 and projections to 2018 for SEVEN types of cancer pain: tumor-related, treatment-related, neuropathic, breakthrough pain, malignant bone pain, visceral pain and soft-tissue pain. Interviews with oncologists and pain clinicians, as well as data from WWMR's US Pain Clinic Monitor provide additional perspective on the cancer pain market. WWMR's US Pain Clinic Monitor is an audit of more than 100 pain clinics that includes prescribing data on 7 cancer pain and 26 other pain indications.

Worldwide, only 25 agents are in active clinical trials for the treatment of cancer pain, but more than 150 agents could have the potential to treat cancer pain. *All* of these agents are reviewed in this report. Currently, worldwide, 42 drugs with the potential to treat cancer pain have reached Phase III+ in their clinical development. The 15 Phase III+ compounds that are being studied specifically for the treatment of cancer pain include novel delivery approaches for the opioid receptor agonist fentanyl (nine compounds), novel formulations of morphine (two compounds), an NMDA receptor antagonist (intranasal ketamine), a topical combination of ketamine and amitriptyline (NP-1, for chemotherapy-induced neuropathy), an IM sodium channel antagonist (tetrodotoxin), and an oral serotonin receptor agonist that stimulates nerve growth factor release (xaliproden).

Most of the drugs recently approved in the world for the treatment of cancer pain are opiates. One exception is GW's dronabinol/cannabidiol (Sativex), a cannabinoid receptor agonist recently approved in Canada for the treatment of cancer pain. The US has not seen a recent approval, but BDSI's ONSOLIS has reached a pre-registration stage of development in the US.

### ADDITIONAL SERVICES AND REPORTS BY WWMR, INC. INCLUDE:

- US Pain Clinic Monitor (available now)
- 2008 US Neuropathic Pain (available now)
- 2008 US Back 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.

**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](http://www.WWMR.com)  
Email: [Michelle\\_Nordstrom@WWMR.com](mailto:Michelle_Nordstrom@WWMR.com)