



This new EP Publications report:

- Provides an epidemiological forecast for key types of back pain in the US market in 2008, 2013, and 2018
- Presents expert analysis of the commercial potential and key differences among products in development for the treatment of back pain
- Includes a PowerPoint presentation reporting views of Pain Specialists treating Back Pain.
- Describes the critical factors driving back pain market growth through 2018
- Insights based upon WWMR's Pain Clinic Monitor, profiling back pain conditions and interviews with specialists in Pain Centers treating back pain.

**Providing an
Enhanced Perspective...**

On

Back Pain

About WWMR, Inc.

WWMR, Inc., is a leading marketing research and strategic consulting firm with global capabilities. Since 1994, WWMR, Inc., has provided high-quality, insightful proprietary studies to clients in the pharmaceutical, biotech, medical device, and diagnostics industries worldwide. Using primary and secondary research methodologies, WWMR, Inc., provides market opportunities and product assessments, competitive intelligence, forecasts, population projections, pre-launch product planning, post-launch product monitoring, product pricing strategy, database products, and on-site information center management. Enhanced Perspective Publications (EP Publications) is the multi-client service of WWMR, Inc.

BACK PAIN

A Complex Market of Diverse Needs

Back pain is one of the most common pain conditions—approximately 80% of Americans will be affected with low back pain at some point in their lifetime. Five out of ten working adults have some back pain every year. The cause of back pain is not always apparent and for approximately 90% of individuals with back pain, the specific cause cannot be identified. Most back pain goes away on its own, with or without medication, though it may take some time to do so. Almost \$100 billion is spent annually to provide relief from back and neck pain through surgery, doctor's visits, X-rays, MRI scans and medications. Back pain can arise from many causes, including the bones, the ligaments that connect muscle to the bone, or the muscles that control movement. It can also arise directly or indirectly from the intervertebral discs, often occurs when nerves, normally protected by the spine, are compressed.

An Opportunity to Meet Unmet Need for Therapy

By 2018, there will be approximately 100 million individuals in US suffering from some form of back pain.

Given this substantial patient population, back pain has received particular attention in recent years. Treatment of back pain varies by etiology, with opioids and other narcotic agents typically prescribed for patients with more severe or chronic pain. Opioid-based medications and NSAIDs are the most commonly prescribed drug classes for back pain. NSAIDs and muscle relaxants are the most commonly used medications for acute back pain. Neurologic medications, such as anticonvulsants and antidepressants, are the most common additional drug classes prescribed for back pain. Patients often develop tolerance to their drugs and thus the choice of drugs and their doses need constant re-assessment by the treating physician. There is still a great need to develop novel therapies that are safe and effective with fewer side effects than currently marketed products.

Report Objectives & Methodology

In this report WWMR, Inc., provides an overview of the back pain in the US market.

This report also summarizes WWMR, Inc.'s current understanding of back pain mechanisms, and highlights promising targets for drug development. Also reviewed are new treatments already in development that offer the promise of improved pain management of back pain in the near future.

Models representing patient populations and the commercial value (USD) of this market in 2008, 2013, and 2018 are presented.

Expert analysis and commentary describing the future back pain market are based on:

- WWMR's Pain Clinic Monitor, profiling back pain (100 Pain Clinics)

- Interviews with Pain Clinicians and Primary Care Physicians
- Comprehensive analysis of drug uses for back pain, including estimations of prescription size, number of refills, and cost
- Evaluation of drugs in the pain drug pipeline, with conclusions on the future directions in the treatment of back pain
- In-depth analysis of the medical literature, including treatment review articles, medical textbooks, epidemiology studies, and clinical studies
- Thorough review of country-specific and overall trends

Market and patient population forecasts are based on a consensus developed from industry experience, clinician input, and analysis of secondary sources.

WWMR's US Back Pain report will allow pharmaceutical and biotechnology executives to:

- Understand the epidemiology of back pain, including projected growth rates, by type of back pain
- Recognize the specific aspects of back pain that have high market potential in the next 10 years
- Target specific patient populations who will benefit most from drugs in the back pain pipeline
- Anticipate upcoming competitors and product licensing opportunities
- Understand the type and level of unmet need in the US back pain market
- Recognize the impact of special market dynamics, including potential off-label usage, on product uptake forecasts

WWMR's US Back Pain report also includes a PowerPoint presentation which comprises perspectives from pain clinic specialists and Primary Care Physicians with expertise in treating back pain. This presentation includes:

- A review of back pain treatment practices incorporating physician verbatims.
- Physician perspectives on routes of administration of back pain medications
- An analysis of physician satisfaction with current back pain treatments
- Physician perspectives on recent advances in back pain treatment
- An analysis of physician-reported unmet needs in back pain treatment.

About EP Publications

Enhance your perspective through EP Publications, a service of WWMR, Inc. Each report pinpoints and evaluates key trends and markets, enabling clients to identify opportunities and augment strategic decisions. In-house consultants with industry experience use qualitative and quantitative research methodologies to provide the most comprehensive and insightful business intelligence available in the life sciences industry.

**TABLE OF CONTENTS ■ BACK PAIN**

- I. **EXECUTIVE SUMMARY**
- II. **INTRODUCTION AND METHODOLOGY**
- III. **PHYSIOLOGY OF BACK PAIN**
 - A. Definition of Back Pain
 - 1. Anatomy of the Back
 - 1.1 Spinal Column
 - 1.2 Spinal Cord
 - 2. Upper and Lower Back Pain
 - 2.1 Upper Back Pain
 - 2.2 Lower Back Pain
 - 3. Acute vs Chronic Back Pain
 - 4. Risk Factors for Back Pain
 - 5. Nociceptive Back Pain
 - 5.1 Cellular Mechanisms of Nociceptive Back Pain
 - 6. Neuropathic Back Pain
 - 6.1 Characteristics of Neuropathic Back Pain
 - 6.2 Cellular Mechanisms of Neuropathic Back Pain
 - B. Conditions Associated with Back Pain
 - 1. Mechanical Disorders
 - 1.1 Muscle Strains and Lumbar Sprains
 - 1.2 Herniated Disc
 - 1.3 Spinal Stenosis
 - 1.4 Spondylosis
 - 1.5 Spinal Cord Injury
 - 1.6 Spondylolysis/Spondylolisthesis
 - 2. Rheumatic Disorders
 - 2.1 Rheumatoid Arthritis
 - 2.2 Ankylosing Spondylitis
 - 2.3 Fibromyalgia
 - 2.4 Myofascial Pain
 - 2.5 Other Rheumatic Disorders
 - 3. Spinal Metabolic Disorders
 - 3.1 Osteoporosis
 - 4. Spinal Infections
 - 5. Spinal Tumors and Malignant Bone Pain
 - 5.1 Benign Spinal Tumors
 - 5.2 Malignant Spinal Tumors
 - 5.3 Malignant Bone Pain
 - 6. Failed Back Surgery Syndrome
 - C. References
- IV. **CLINICAL ASSESSMENT OF BACK PAIN**
 - A. Initial Assessment
 - 1. Patient Medical History
 - 2. Physical Examination of the Back Pain Patient
 - 3. Laboratory Tests
 - 4. Additional Evaluation
 - B. Pain Intensity Scales
 - 1. Standard Quantitative Pain Measurement Scales
 - 1.1 Visual Analog Scale (VAS)
 - 1.2 Numeric Rating Scale (NRS)
 - 1.3 Verbal Descriptor Scale (VDS)
 - 1.4 Thermometer Scale
 - 1.5 Faces Pain Scales
 - 2. Multi-Factorial Pain Scales
 - 2.1 McGill Pain Questionnaire (MPQ)
 - 2.2 The Neuropathic Pain Scale (NPS)
 - 2.3 Patient Pain Profile (P-3)
 - 3. Pain Assessment by Functional Scales
 - 3.1 Oswestry Disability Index
 - 3.2 Epworth Sleepiness Scale (ESS)
 - 3.3 Aberdeen Low Back Pain Scale
 - 3.4 Brief Pain Inventory (BPI)
 - 3.5 Other Methods of Functional Assessment
 - C. References
- V. **EPIDEMIOLOGY - CURRENT AND FUTURE**
 - A. Back Pain Prevalence
 - B. Back Pain Prevalence by Type of Pain
 - 1. Neck and Upper Back Pain
 - 1.1 Acute Neck and Upper Back Pain
 - 1.2 Chronic Neck and Upper Back Pain
 - 2. Low Back Pain
 - 2.1 Acute Low Back Pain
 - 2.2 Chronic Low Back Pain (Non-Neuropathic)
 - 2.3 Neuropathic Chronic Low Back Pain
 - 3. Basis for Target Population
 - 4. US Back Pain Population Forecasts
 - C. References
- VI. **APPROACHES TO TREATMENT OF BACK PAIN**
 - A. Clinical Practice Guidelines
 - B. Actual Clinical Practice
 - 1. Anti-Inflammatory Pain Medications
 - 2. Muscle Relaxants
 - 3. Anticonvulsants
 - 4. Antidepressants
 - 5. Benzodiazepines
 - 6. Opioids and Semi-Synthetic Narcotics
 - 6.1 Specific Opioids
 - 6.2 Synthetic and Semi-Synthetic Narcotics
 - 6.3 Opioids plus Anti-Inflammatories
 - 7. Other Drugs
 - 8. Local and Regional Injections
 - 8.1 Lidocaine and Other Anesthetics
 - 8.2 Epidural Corticosteroid Injections
 - 8.3 Joint Injections
 - 8.4 Nerve Root Blocks
 - 8.5 Intradiscal Injections
 - 8.6 Peripheral Nerve Blocks
 - 8.7 Trigger Point Injections
 - 9. Surgical Intervention
 - 9.1 Discectomy
 - 9.2 Laminectomy
 - 9.3 Fusion
 - 9.4 Vertebroplasty
 - 9.5 Vertebral Disc Replacement
 - 9.6 Spinal Cord Stimulator
 - 10. Alternative Treatments
 - 10.1 Spinal Manipulation
 - 10.2 Exercise
 - 10.3 Acupuncture
 - 10.4 Electrical Nerve Stimulation
 - 10.5 Hypnosis and Psychological Approaches
 - C. Limitations of Current Treatment
 - D. Promising New Approaches
 - E. Future Trends
 - F. Drugs in Clinical Development to Treat Back Pain
 - 1. Recent Launches/Approvals
 - 2. Current Pipeline
 - 3. Phase III, Preregistration, and Registration
 - 4. Phase II
 - 5. Phase I
 - G. References
- VII. **MARKET ESTIMATES, CURRENT AND FUTURE FORECAST**
 - A. Current Sales of Pharmaceutical Products, by Drug Class
 - 1. 2008 US Market: Summary by Drug Class
 - 1.1 Anticonvulsants
 - 1.2 Opioids
 - 1.3 Antidepressants
 - 1.4 Other Drug Classes
 - 2. Methodology
 - B. Market Forecast for Back Pain, by Drug Class
 - 1. US market forecast: summary by drug class
 - 1.1 Anticonvulsants
 - 1.2 Opioids
 - 1.3 Antidepressants
 - 1.4 Other drug classes
 - 2. Methodology
 - C. References



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