

# Menstrual Migraine

## An Opportunity to Gain a Competitive Advantage for Triptan Manufacturers

Publication Date: May-03

Product Code: BFHC0607

Menstrual migraine affects over 15 million women across the seven major pharmaceutical markets. At present, the disease is managed using a wide variety of pharmacological treatments.

However, none of these compounds have an indication specifically for menstrual migraine and few have proven efficacy in this disease. Several of the pharmaceutical manufacturers have now recognized the need for new treatments and have begun clinical trials in this area. This Brief provides an overview of the epidemiology, treatment, unmet needs, and market opportunities in menstrual migraine.

timely

Reacting to the latest news  
breaking in your industry

focused

Hundreds of hours of analyst  
time distilled into a few pages

primary research

Unique survey data and  
interview results

thought-provoking

Fresh opinions and  
out-of-the-box thinking

For details of all Datamonitor Healthcare Market Briefs, go to:

**[www.datamonitor.com/healthcare](http://www.datamonitor.com/healthcare)**



## Scope and coverage

- **Overview** of epidemiology data and patient potential of the menstrual migraine market
- **Evaluation** of current treatments and key unmet needs
- **Therapeutic and market potential of compounds** in clinical trials and other compounds not currently in trials for this indication

## Research methodology

This Market Brief includes an assessment of published clinical data. Secondary sources on cephalalgia, headache, and neurology were utilized, in addition to the 55th Annual Meeting of the American Academy of Neurology in Honolulu, Hawaii.

## Key findings and highlights

- Pharmaceutical manufacturers competing in the migraine market should adopt the standardized definition of menstrual migraine proposed by the International Headache Society.
- Extensive placebo-controlled clinical trials should be initiated to provide robust data showing the true clinical advantages of medications, such as the triptans, for menstrual migraine.
- Research and development should focus on compounds that address unmet needs such as migraine-specific compounds, short-term prophylactic therapies, treatment refractory patients, and quicker onset of action.
- Other drugs manufacturers with anticonvulsant and antidepressant therapies should position their products as an alternative treatment for menstrual migraine.

## For more information...

Contact Susanne Begley, CNS Business Unit Director

tel: +44 20 7675 7159

fax: +44 20 7675 7016

email: [hcinfo@datamonitor.com](mailto:hcinfo@datamonitor.com)

# Summary of contents

## DRIVERS AND TRENDS

Menstrual migraine affects over 15 million women across the seven major pharmaceutical markets. At present, the disease is managed using a wide variety of pharmacological treatments. However, none of these compounds have an indication specifically for menstrual migraine and few have proven efficacy in this disease. Several of the pharmaceutical manufacturers have now recognized the need for new treatments and have begun clinical trials in this area.

## DISEASE OVERVIEW

Migraine is a disease characterized by recurrent headache attacks usually accompanied by nausea, vomiting, photophobia and/or phonophobia. In adults, these attacks may last for four to 72 hours, with women three times more likely to be affected than men. Several studies suggest that most headaches suffered by females are menstrual migraines. This section provides a definition of menstrual migraine and its cause. Detailed prevalence, diagnosis and treatment rates are used to assess the patient potential of the menstrual migraine market.

## TREATMENT OF MENSTRUAL MIGRAINE

Menstrual migraine is managed by both non-pharmacological and pharmacological therapies. The pharmacological management of menstrual migraine generally involves the use of acute treatment and/or prophylactic treatments. What are the key unmet needs for menstrual migraine? This section provides a comprehensive review of treatment currently used to treat the disease. This is followed by an assessment of unmet needs and recommendation for how these can be addressed.

## CLINICAL TRIALS

With seven triptans available, the migraine market has become extremely competitive and, in response, many of the companies have begun targeting niche migraine markets in order to differentiate themselves from their competitors. Several of these triptans are now undergoing clinical trials for menstrual migraine. Which of these products have the greatest market potential? This section provides clinical data for Imigran (sumatriptan), Naramig (naratriptan), Zomig (zolmitriptan), Maxalt (rizatriptan), Frova (frovatriptan), and Relpax (eletriptan). A comparative analysis of the triptans evaluates how each pharmaceutical manufacturer should position their product in order to maximize market share and revenues.

## OTHER MARKET OPPORTUNITIES

Although the triptans look set to gain first to market advantage in the treatment of menstrual migraine, Datamonitor believes that there are opportunities for other pharmaceutical manufacturers to position their products as treatments for menstrual migraine. This section discusses the potential use of anticonvulsants and antidepressants, the likelihood of gaining a menstrual migraine indication, and marketing strategies.

*“...With no consensus on the definition of menstrual migraine, it is inevitable that menstrual migraine is frequently undiagnosed and inadequately treated...”*



## Interested in this topic?

Datamonitor Healthcare's CNS Strategic Planning Program (SPP) is a tailored, continuous advisory service combining In-Depth Analyses and Market Briefs from the CNS portfolio with Analyst Support, Data and Slide Packs, and an Executive Presentation.

With a strong focus on flexibility and eDelivery, we offer a customized service that enables you to meet challenges head-on and identify new opportunities.

## Other analyses available in this series

### Pipeline Insight: Anticonvulsants

Drug Versatility Crucial for Market Success

The commercial potential of anticonvulsants market is beginning to be recognized, and the R&D pipeline is packed with numerous reformulations and innovative projects. Given the success of Pfizer's market leading Neurontin, with sales of over \$2bn in 2002 driven mainly by growth in the neuropathic pain market, companies are keen to expand the labeling of their products beyond epilepsy.

This report analyzes the potential of approved and new anticonvulsants, with an emphasis on the epilepsy, bipolar disorder, neuropathic pain, and migraine markets.

*published: Jul-03*

*DMHC1889*

*\$9,600*

### The Future of COX-II Inhibitors

Market Challenges and Pipeline Initiatives

The non-steroidal anti-inflammatory drug (NSAID) market has been dominated by COX-II inhibitors for the past several years but the majority of the success of these products has occurred in the US. This Market Brief analyzes the challenges facing COX-II inhibitors in Europe, as well as the keys to success for these products upon launch in Japan in 2004. Finally, the Brief evaluates novel compounds and mechanisms with the potential to directly challenge COX-II inhibitors in the future.

*published: Feb-03*

*BFHC0559*

*\$1,500*

For more information on these and other related analyses, go to: [www.datamonitor.com/healthcare](http://www.datamonitor.com/healthcare)

## Subscribe to Healthcare Monitor

A monthly update of the latest Healthcare products, events, news and special offers from Datamonitor, delivered to you by email. To subscribe email your contact details to [hcmmonitor@datamonitor.com](mailto:hcmmonitor@datamonitor.com) with **Subscribe** in the subject line

## Subscribe to Healthcare Digests

Get the latest Healthcare insight from our expert analysts in our free weekly email newsletters. Visit [www.dmnewsletters.com/healthcare.htm](http://www.dmnewsletters.com/healthcare.htm) to subscribe to the Digest(s) of your choice

# Place your order now...

Fax back to **+44 20 7675 7016** (from Europe) or **212 686 2626** (from the US)

## I would like to order:

Product title	Product code	Price £ / € / \$ / ¥ *

\* Please refer to our website [www.datamonitor.com](http://www.datamonitor.com) for up-to-date prices

## Complete your details:

Name \_\_\_\_\_

Job Title \_\_\_\_\_

Department \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

State/Province \_\_\_\_\_

Post Code/ZIP \_\_\_\_\_

Country \_\_\_\_\_

Email \_\_\_\_\_

Tel \_\_\_\_\_

Fax \_\_\_\_\_

## Sign below to confirm your order:

\_\_\_\_\_

## Complete payment details:

Please indicate your preferred currency option: ☐ UK£ ☐ Euro€ ☐ US\$ ☐ Yen¥

☐ I enclose a cheque payable to Datamonitor plc for \_\_\_\_\_ (+ p+p \$30 UK / \$60 rest of world)

☐ Please invoice my company for \_\_\_\_\_ (+ p+p \$30 UK / \$60 rest of world)

☐ Please debit my credit/charge card



Amex



Visa



Diners



Mastercard

Card No \_\_\_\_\_

Expiry Date \_\_\_\_\_ / \_\_\_\_\_ Cardholder Signature \_\_\_\_\_

Cardholder address \_\_\_\_\_

Please supply purchase order number here if required by your accounts department:

\_\_\_\_\_

EU companies (except UK) must supply: VAT / BTW / MOMS / MWST / IVA / FPA number:

\_\_\_\_\_

Datamonitor products and services are supplied under Datamonitor's standard terms and conditions, copies of which are available on request. Payment must be received within 28 days of receipt of invoice.

☐ I do not want to receive future mailings from Datamonitor and its related companies.

☐ Occasionally, our client list is made available to other companies for carefully selected mailings. Please check here if you do not wish to receive such mailings.

From Europe: tel: +44 20 7675 7000

fax: +44 20 7675 7016

email: [ukinfo@datamonitor.com](mailto:ukinfo@datamonitor.com)

From the US: tel: +1 212 686 7400

fax: +1 212 686 2626

email: [usinfo@datamonitor.com](mailto:usinfo@datamonitor.com)

From Asia Pacific: tel: +61 2 9006 1526

fax: +61 2 9006 1559

email: [apinfo@datamonitor.com](mailto:apinfo@datamonitor.com)

Contact us to find out more about our products and services

 **DATAMONITOR**