

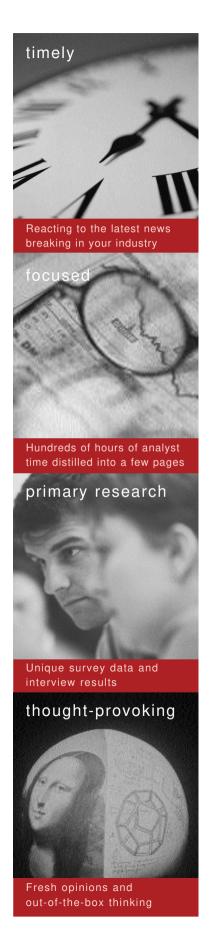
Menstrual Migraine

An Opportunity to Gain a Competitive Advantage for Triptan Manufacturers

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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.



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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

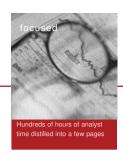
Research methodology

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 guicker 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...



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 form 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..."



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

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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.

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