

Global Anti-Migraine Drugs Market – Trends and Opportunities (2014-2019)



View Report Details

Scope of the Report

The report titled "Global Anti-Migraine Drugs Market: Trends and Opportunities (2014-2019)" provides an insight into migraine drugs with a special focus on Triptans. The report also includes the market value, segmentation, types of diagnosis and treatment for migraine. It also discusses key growth drivers and upcoming trends of the market. Further, key manufacturers of anti-migraine drugs like Endo International Inc, Impax Laboratories, GlaxoSmithKline and Pfizer Inc. are profiled in the report.

Segments Coverage

- ⊖ Triptans
- ⊖ Ergot Alkaloids

Company Coverage

- ⊖ Endo International Inc.
- ⊖ IMPAX Laboratories Inc.
- ⊖ GlaxoSmith Kline (GSK)
- ⊖ Pfizer Inc.

Executive Summary

Migraine, a condition of recurring headaches and is accompanied by symptoms like nausea, vomiting, dizziness and sensitivity to light and noise ranks among the World's Top 20 disabling medical illnesses. It is anticipated that launches of many generic migraine drugs over the next several years will steadily increase diagnosis and drug-treatment rates, leading to sustained annual global growth of anti-migraine drugs market. Other factors contributing to the growth of these drugs include awareness among the people about proper diagnosis and treatment of migraine, rise in medical expenditures and new drugs launches.

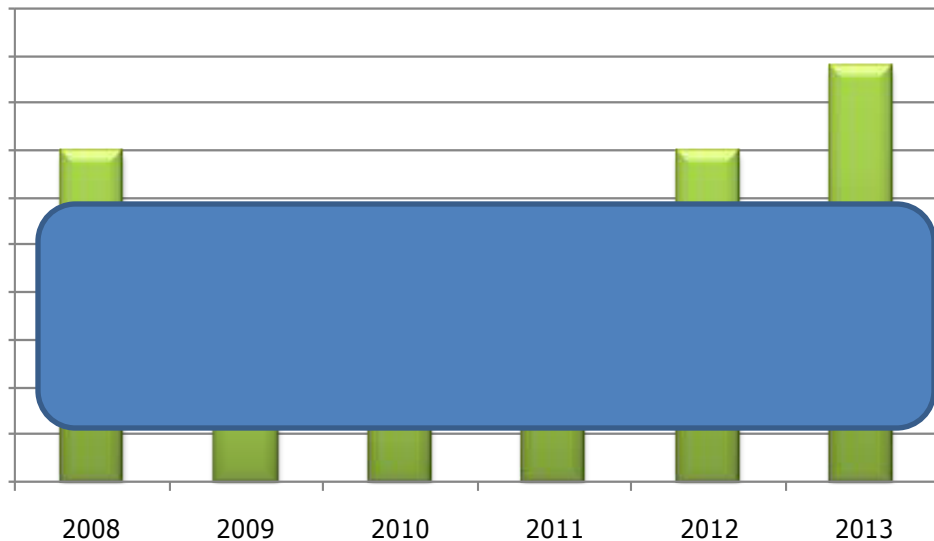
Acute migraine treatment market is dominant by Triptans and most of them are available as pills. Triptans like Sumatriptan and Zolmitriptan are also available as nasal sprays whereas rizatriptan and zolmitriptan are available as tablets that dissolve in mouth. In next 5-10 years, cost of migraine drugs is anticipated to decline due to many generic entrants as most of them are losing their patents. Growing awareness of migraine in the emerging countries and fall in prices will facilitate the growth of anti-migraine drugs market. In addition, with the development of new treatment therapies like calcitonin gene-related peptides (CGRP) receptor antagonist and BOTOX the demand for anti-migraine drugs is anticipated to grow further.

The US is the largest market for anti-migraine drugs and there are number of companies that manufacture these drugs. Major companies include Impax, Endo Pharmaceuticals, Pfizer, GlaxoSmith Kline, Nautilus and Allergan.

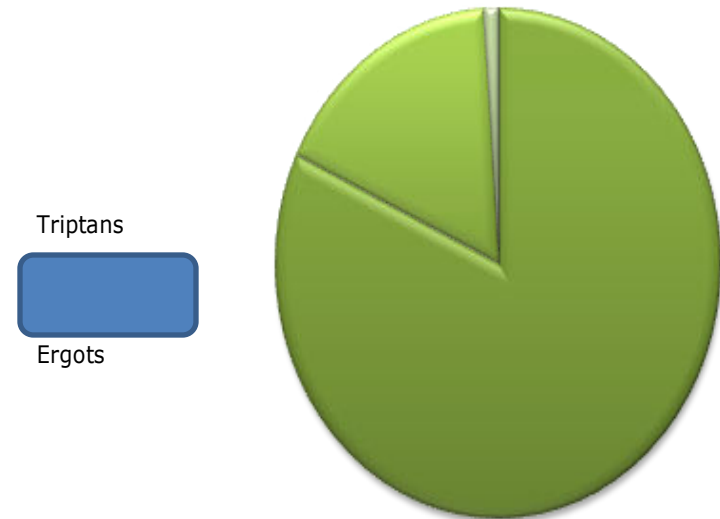
Global Anti-Migraine Drugs Market

Nearly% people worldwide are affected by migraine, translating into a market size of US\$.... billion in 2013. Drivers contributing to the growth of migraine drugs market include awareness among the people about proper diagnosis and treatment of migraine, rise in medical expenditures and new drugs launches.

Global Migraine Drugs Market Size (US\$ Billion), 2009-2013



Segmentation of Migraine Drugs by Types, 2013



- Acute migraine treatment market is dominant by Triptans that accounted for% of total drugs revenue in 2013. Isometheptene are the second highest, accounting for ...% of prescriptions followed by Ergots having a share of ...%.

The US Anti-Migraine Drugs Market

The US is the largest market globally and accounted for approximately ...% of total anti-migraine drugs revenue in 2013. It is estimated that total number of acute migraine sufferers will increase from ...million in 2012 to ... million by 2017 and that of chronic migraine sufferers from ... million in 2012 to million by 2017.

Total Number of Migraine Sufferers in the US in Million, 2012E-2017E

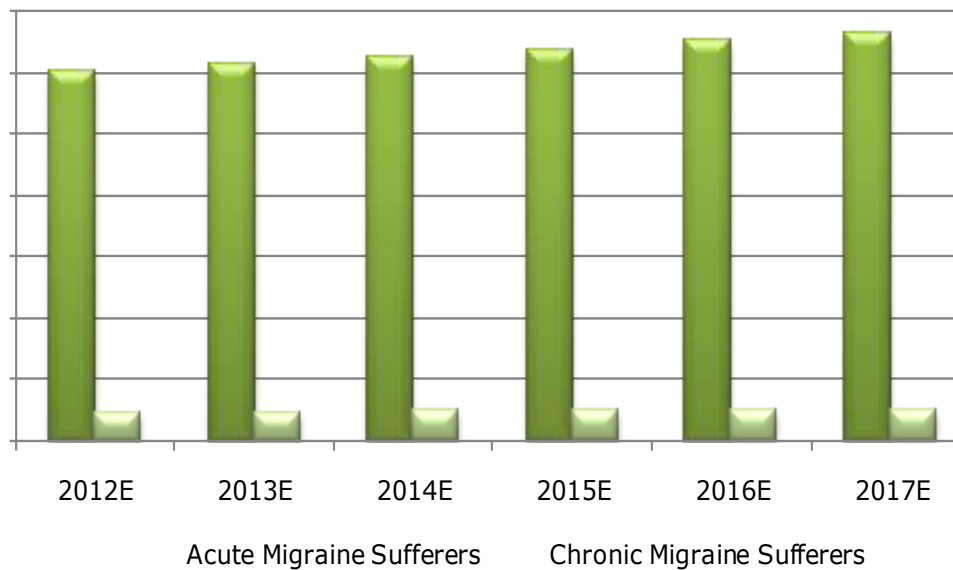
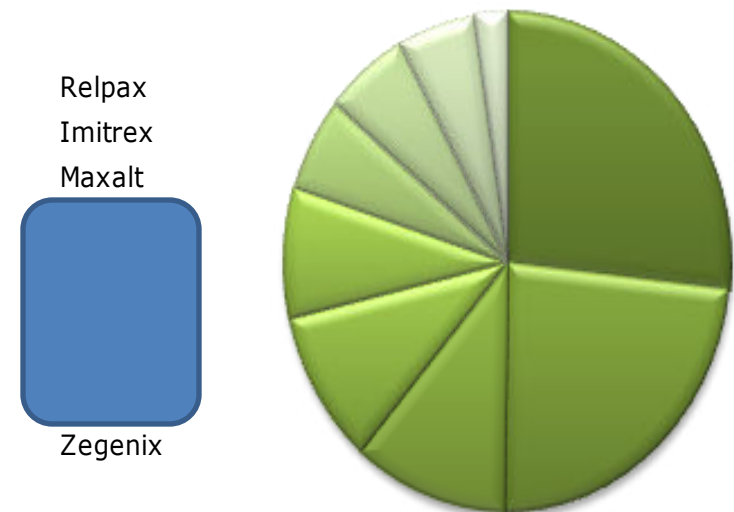


Figure 9: Market Shares of Triptan by Brands in the US, 2013



- Triptans account for the largest portion of overall anti-migraine drugs consumed in the US. As more triptan brands become generic in the coming years, it is expected that the demand will subsequently increase. Relpax brand manufactured by Pfizer has the highest market share.