GBI Research
Global Business Intelligence

London – 22 August 2016 - Although opioids continue to dominate the chronic pain market, adverse events associated with the drug such as the potential for abuse mean the treatment space is rife with unmet needs, which is encouraging pharmaceutical companies to explore innovative alternatives to opioids, according to business intelligence provider GBI Research.

The company's latest report states that while opioids remain the most effective modes of treatment, their potential for abuse has yet to be addressed, and thus their effectiveness is limited in chronic pain conditions, as they cannot be used for prolonged durations.

Dominic Trewartha, Managing Analyst for GBI Research, states that: "Moderate-to-severe pain has been and continues to be dominated by opioids, which are increasingly being reformulated to offer abuse resistance, whereas mild pain is effectively being treated with non-steroidal anti-inflammatory drugs (NSAID).

"However, significant unmet needs remain, as chronic pain subtypes – and particularly neuropathic pain – often do not respond well to existing therapies, which do not align well with the underlying molecular pathophysiological causes of pain."

While the pain therapeutics pipeline is extremely large and diverse, it is characterized by a high overall historic clinical attrition rate for novel analgesics, and a low level of first-in-class innovation.

The active pain pipeline is populated by 810 products across all stages of development, which exhibit a highly diverse range of molecular targets. GBI Research's analyses identified 129 first-in-class programs in active development, constituting 20% of the pipeline for which there is a disclosed molecular target, and acting on 80 first-in-class molecular targets.

Trewartha explains: "Although this level of innovation is lower than the overall averages for central nervous system disorders and the industry as a whole, this segment of the pipeline

nevertheless comprises a diverse range of promising products, which offer significant potential to yield clinical improvement.

“While many companies are following a strategy of developing products with similar mechanisms of action to existing products, there are also many innovative products in the pain pipeline. These first-in-class products reflect a deepening scientific understanding of the underlying pathophysiology of pain, and a growing list of molecules that have been implicated in the initiation of acute pain and progression to a chronic pain state.”