GlobalData

London – 24 October 2016 - The US market for major depressive disorders (MDD) will rise from $2.4 billion in 2015 to $4.6 billion by 2025, at a strong compound annual growth rate (CAGR) of 6.6%, according to research and consulting firm GlobalData.

The company's report states that the US will not only remain the largest major market for MDD drugs, but will extend its lead over other countries, primarily due to the wide-ranging availability of treatments and the commercial success of atypical antipsychotics, which generated 39% of the sales in the US market in 2015.

Christos Michaelides, Ph.D., GlobalData's Analyst covering Neurology and Ophthalmology, explains: "As a class, atypical antipsychotics are due to retain their market share during the forecast period and are expected to generate sales of $1.9 billion in 2025, with a CAGR of 7.1%, which will represent a little over two-fifths of the US MDD market.

"The main driver behind the success of atypical antipsychotics in the MDD market is the high price for drugs in this class. While Abilify generated the greatest revenue for the atypical antipsychotics in 2015, its sales will remain static during the forecast period. This will be due to increasing use of generic aripiprazole, and competition from Otsuka/Lundbeck's Rexulti, which is due to see its US sales increase rapidly to just under $588 million by 2025."

GlobalData estimates that five products in the late-stage pipeline will enter the MDD market in the US during the forecast period: Alkermes' ALKS-5461, Allergan/Gedeon Richter/Mitsubishi Tanabe's Vraylar, Axsome Therapeutics' AXS-05, Janssen's esketamine , and Allergan's rapastinel. By 2025, GlobalData expects that these pipeline drugs will generate over $800 million, of which Janssen's esketamine will achieve the greatest share.