Venous Thromboembolism - 2015

Venous thromboembolism (VTE), comprising deep vein thrombosis (DVT) and pulmonary embolism (PE), represents a significant public health and financial burden. The expansion of the treatment labels of the four nonmonitored, fixed-dose, oral anticoagulants into the treatment and secondary prophylaxis of VTE is addressing the need for more-convenient alternatives to current standards of care; and these agents will drive market growth during the forecast period. However, opportunities remain in other underserved VTE indications, including primary prophylaxis of VTE in acute medically ill and ambulatory cancer patients.

Questions Answered in This Report:

- The oral anticoagulant rivaroxaban (Bayer/Janssen’s Xarelto) was the first of the novel agents to gain approval for the acute treatment and secondary prophylaxis of VTE, with dabigatran etexilate (Boehringer Ingelheim’s Pradaxa), apixaban (Bristol-Myers Squibb/Pfizer’s Eliquis), and edoxaban (Daiichi Sankyo’s Lixiana) following. How do thought leaders perceive each of these drugs and their differentiating features? How will uptake of these agents in the market impact on current market-leading therapies? Which agents will be most successful and why?

- The VTE primary prophylaxis market encompasses several different patient populations, with the novel oral anticoagulants only gaining approval in some settings. What lessons can be learned from negative clinical trial results in VTE primary prophylaxis populations outside of the orthopedic surgery setting? Which patient subpopulations have the greatest remaining unmet need and commercial potential?

- Following recent anticoagulant drug approvals as well as drug discontinuations, the pipeline of new VTE therapies appears relatively bare in the near term. However, exciting developments are being made for label expansions for the novel oral anticoagulants and new therapeutic targets. What do thought leaders think of these therapeutic approaches? What do physicians think of the other emerging therapies betrixaban and ISIS-FXIRx?

Scope:

Markets covered: United States, France, Germany, Italy, Spain, United Kingdom, Japan.

Primary research: 20 country-specific interviews with expert thought leaders.

Epidemiology: Number of DVT events; number of PE events; number of hospitalization events
(orthopedic surgery, major non-orthopedic surgery, nonsurgical) eligible for VTE acute primary prophylaxis; number of prevalent cases of cancer patients eligible for VTE primary prophylaxis.

Population segments in market forecast: Primary prophylaxis indications (major orthopedic surgery, non-orthopedic surgery, nonsurgical patients, cancer patients eligible for prophylaxis); acute DVT treatment and secondary prophylaxis; acute PE treatment and secondary prophylaxis.

Emerging therapies: Phase II: 2 drugs; Phase III: 3 drug; registered: 0 drugs. Coverage of select preclinical and Phase I products.

Report Details
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