

HAI Drug Market Will Decrease Modestly by 2018

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Posted on: 04/05/2010

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Decision Resources, a leading research and advisory firm for pharmaceutical and healthcare issues, finds that, through 2018, the crowded hospital-acquired infections (HAIs) drug market will be constrained by aggressive generic erosion of key brands, intensified competition and increasingly stringent regulatory and reimbursement environments. As a result, the market will decrease from nearly \$4 billion in 2008 to \$3.7 billion in 2018 in the United States, France, Germany, Italy, Spain, the United Kingdom and Japan.

The Pharmacor 2010 findings on the topic of hospital-acquired infections reveal that the launches of a dozen new therapies will partially offset sales losses and will account for nearly 20 percent of 2018 major-market sales. Because the launch of these emerging agents will be concentrated in a narrow span (2015-2018), the hospital-acquired infections market is poised to become increasingly crowded. As a result, the timing of market entry for emerging therapies will play an important role in their positioning, uptake and commercial success.

"Although the hospital-acquired infections market is currently dominated by parenteral agents, drug developers have recognized a long-standing need for more agents that are available in either oral formulation or interchangeable IV and oral formulations, and several such agents are poised to launch by 2018," said Decision Resources analyst Hemali Patel, PhD. "Included among the innovative emerging therapies are at least four first-in-class, broad-spectrum antibiotics."

These emerging therapies include anti-MRSA cephalosporins (Forest/AstraZeneca/Takeda's ceftaroline and Basilea's ceftobiprole), an anti-MRSA carbapenem (Novartis's razupenem) and an anti-MRSA quinolone (Rib-X's delafloxacin).

"Of the emerging therapies, ceftaroline is best poised for commercial success owing to its early market entry and its significant expansion in spectrum over currently marketed cephalosporins," Patel added.

The Pharmacor 2010 findings also reveal that, due to the increasing competition in the crowded drug market for hospital-acquired infections, emerging therapies will face bigger challenges in gaining formulary inclusion and will need to demonstrate clear

differentiation from current therapies.

Additionally, the use of new therapies in the hospital setting is likely to be scrutinized and monitored more carefully, owing to increasing emphasis on antibiotic surveillance and stewardship programs. However, despite these constraints, the hospital-acquired infections drug market will continue to be a key segment of the overall antibiotics market as unmet need in certain segments such as gram-negative infections will create market opportunities for novel therapies that are active against antibiotic-resistant pathogens.