

Injectable Drug Delivery

Technologies, Targets and Therapeutics

May 2008



Greystone Associates

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The market for injectable drugs is undergoing significant change as traditional syringes give way to a new class of injection devices

The shift is being driven by a host of market forces that include caregiver safety, patient ease-of-use, and healthcare economics

Combination products for a host of important diseases and conditions are currently winding their way through the development and clinical trial process

Growth of alternative injection methods will be influenced by a number of factors, including improved patient compliance and patient quality-of-care, and the trend toward drug therapy self-administration

Greystone Associates is pleased to announce the publication of a new market study. **Injectable Drug Delivery: Technologies, Targets and Therapeutics** is a comprehensive evaluation and analysis of the technology, products and participants providing the driving force behind this evolving segment of the drug delivery sector.

Published in May (2008), the study is designed to provide drug company decision makers, drug delivery developers, device designers, healthcare marketers, and supply chain participants with a detailed understanding of the economics, technologies, disease segments, and commercial opportunities for injectable drugs. Provider organization business managers, healthcare administrators and investors will also benefit from this study.

Concurrent Engineering & Patient-Friendly Drug Delivery

Second only to pills and capsules in terms of importance, administration of therapeutic drugs via injection is an indispensable delivery method for numerous drugs critical to patient health and well-being. But within this segment, the sands are shifting as several factors converge to drive demand for delivery methods that increase safety, compliance and ease-of-use. While the economics of traditional disposable syringes remain compelling, a number of companies are combining synthetic materials and novel device designs to create, next-generation devices with improved reliable and lower cost.

These devices – safety syringes, pens and needle-free injectors – are competing for a share of an injectables market that will be driven by a new class of drugs – therapeutic biologicals. Protein- and peptide-based drugs have already begun to take their place as a predominant class of therapeutic substances with growing importance for the treatment of chronic conditions and heretofore-refractory conditions. Combination drug-device products that incorporate alternative injection devices will experience double digit growth over the next five years, as self-administration for chronic ailments and caregiver safety drive the market away from traditional syringes.

Executive Summary

Injectable Drugs & the Leading Edge of Drug Therapeutics

Pipeline Drugs Represent Significant Opportunities

Demand Drivers

Diseases and Indications

Patient Demographics

Developing Economies

Market Factors

Managed Care and Healthcare Costs

Regulations and Regulatory Sentiment

Technology Drivers

Drug Stability

Drug Delivery Devices

Combination Products

Patient/Caregiver Sentiment

Commercial Injection Device Assessment

Traditional Syringes

Safety Syringes

Needle-free Injectors

Pen Injectors

Prefilled Devices

Diseases, Indications and Injectable Therapeutics

Hematopoietics

Important Indications

Competition for a \$14 Billion Market

Anti-Inflammatory

Important Indications

Blockbuster Drugs Dominate the Sector

Pipeline and Outlook

Immune Modulators

Important Indications

Rapidly Expanding Targets and Indications

Pipeline and Outlook

Anticoagulants

Important Indications

Lovenox Continues to Dominate

Pipeline and Outlook

Growth Hormones

Important Indications

Strong Competition for Market Share

Pipeline and Outlook

Reproductive Medicine

Important Indications

Gonal -f % Follistim Drive Sector Beyond \$1 Billion

Pipeline and Outlook

Market Factors

FDA Regulations

Clinical Trials

Rx-to-OTC Switching

Impact of Generics

Profiles of Market Participants

Market Data

The study presents qualitative and quantitative data and information on key market measures and benchmarks:

- Syringe & Injector profiles and analysis
- Injection Device Design Factors
- Industry Structure & Competitive Landscape
- Injectable Drug Demand Drivers
- Technology Factors
- Injectable Drug Delivery Segment Analysis
- Market Projections by Therapy
- Emerging Therapies Opportunity/Risk Assessment
- Market Factors
- Regulatory Factors

Methodology

Research methodology is based on primary research in the form of in-depth interviews with key market participants, technology developers, distributors, industry experts, and market influencers, a list that includes regulatory officials, industry trade groups, and materials standards organizations.

Primary data is evaluated and normalized against secondary sources including trade journal articles, technical literature, industry publications, company data sheets and published information, and statistical data from government agencies and trade associations.

Forecasts and projections of market demand and future market activity are derived using standard modeling and statistical techniques

Feature Summary

- Analyzes and evaluates the shifting landscape for injectable drug delivery and assesses the market impact of new and emerging drug-device combination products by therapeutic indication
- Analyzes injector device designs, competing technologies and market development issues
- Provides detailed descriptions of key injectable drug therapeutic market segments, market demographics, and business strategies
- Forecasts injectable drug product demand and by therapy to 2011
- Profiles leading injection device companies, their product development activities, business strategies, and corporate alliances and affiliations
- Evaluates the impact of economic, technology, and regulatory factors on injectable drug delivery demand

Report Format and Availability

This report is available electronic format. A site license for a single physical location and a global license are also available. Publication is scheduled for May, with availability on or before May 15th.

About Greystone Associates

Greystone Associates is a medical technology consulting firm focused on the areas of medical market strategy, product commercialization, venture development, and market research. We assist medical and healthcare market participants in achieving their business objectives through the creation of detailed development strategies, product commercialization programs, and comprehensive market and technology research and analysis.

Our market research publications are designed, researched and written to provide timely and insightful information and data on focused market segments, with the aim of providing market participants with the essential knowledge to refine and execute their marketing plans and financial targets.

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