

# Transdermal Skin Patches

## *Markets and Opportunities*

April 2007



**Greystone**

associates

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Transdermal drug patches offer the advantages of ease of use, painlessness, disposability, control of drug delivery and avoidance of first-pass metabolism by the liver

New patch designs and formulation technologies are expanding the type and number of prescription therapies and treatments that can be effectively administered to patients and consumers

Advances in synthetic materials and patch design have led to patches that are more esthetically acceptable and that are capable of delivering sustained dosing of active compounds for several days in a smaller package

Growth in demand for prescription drug patches is being driven by several factors – factors with strong demographic and population trend underpinnings

Greystone Associates is pleased to announce the publication of a new market study. **Transdermal Skin Patches: Markets and Opportunities** is a comprehensive evaluation and analysis of the markets, products and participants in the rapidly growing skin patch segment of the health care sector.

Published in April (2007), the study is designed to provide drug companies, consumer healthcare marketers, patch manufacturers, and supply chain participants with a detailed understanding of the economics, technologies, therapies, and potential for skin patches, and to identify business opportunities for skin patch products within the healthcare industry. Provider organization business managers, healthcare administrators and investors can also benefit from this study.

### **Skin Patch Market Dynamics**

Created as an alternate route of administration to improve patient compliance and reduce prescription drug side effects, skin patches are rapidly becoming an important consumer healthcare product category. Transdermal drug patches offer the advantages of ease of use, painlessness, disposability, control of drug delivery and avoidance of first-pass metabolism by the liver. Advances in synthetic materials and patch design have led to patches that are more esthetically acceptable and that are capable of delivering sustained dosing of active compounds for several days in a smaller package.

Patches relying on passive transport mechanisms have been limited in their ability to deliver new classes of drugs, but formulations employing penetration enhancers, and patch designs incorporating microporation and energy-assisted delivery are expanding the range of drugs that can be effectively delivered transdermally. Growth in demand for drug patches is being driven by several factors – factors with strong demographic and population trend underpinnings. Further improvements to transdermal transport and the introduction of new patch designs will keep this segment expanding through 2010.

## **Executive Summary**

### **Prescription Patch Market Dynamics**

The Transdermal Drug Delivery Marketspace  
Skin Patch Economics  
Important Patch Drug Therapies  
Transdermal Drug Packaging  
Demand Drivers  
Competitive Landscape  
Factors Limiting Growth

### **Prescription Patch Design & Technology**

Patch Architecture  
Passive Transdermal Patch Design  
Passive Patch Construction  
Active Transport Patch Technologies  
Evolving Prescription Patch Technologies

### **Prescription Patch Development Factors**

The Design Cycle  
Design Partnerships  
Patch Product Testing  
Trials and Submissions  
Approvals and Dosage Forms  
Patch Manufacturing Dynamics  
Patch Manufacturing Company Profiles

### **Prescription Patch Design & Acceptance Factors**

Dosing and Rate Factors  
Materials Compatibility  
Clinical Trial Process  
Biocompatibility

### **Market Factors**

FDA Regulations  
Rx-to-OTC Switching  
New Patch Technologies  
Skin Patch Revenue Models

### **FDA-Approved Patch Therapies – Analysis and Market Data**

ADHD  
Contraception  
Cardiovascular/Angina  
Depression  
Hormone Replacement Therapy  
Hypertension  
Local Anesthetics  
Motion Sickness  
Osteoporosis  
Pain Management

### **Emerging Patch Therapeutics – Opportunity and Risk Assessment**

Alzheimer's  
Asthma  
Diabetes  
Parkinson's Disease  
Sexual Dysfunction  
Vaccines

### **Transdermal Patch Company Profiles**

*(Detailed profiles of 35 market participants)*

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## ***Market Data***

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

- Market Size by Segment
- Market Share Data
- Patch Manufacturing
- Transdermal Technology
- Industry Structure
- Patch Economics
- Patch Design Criteria
- Product Pricing
- Emerging Markets
- Market Projections
- Revenue Models
- Commercialization Factors
- Emerging Technology
- Market Factors
- Regulatory Factors

Forecasts and projections cover the period from 2007 to 2010.

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## **Methodology**

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

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- Analyzes and evaluates current skin patch products and assesses the market potential for existing and probable future products
- Analyzes patch designs, technologies and patch development issues
- Provides detailed assessments of more than thirty patch products in more than a dozen product categories
- Charts product sales data, market share, and forecasts to 2010
- Profiles patch companies, their product development activity, and strategies
- Evaluates the impact of economic, technology, and regulatory factors

## **Report Format and Availability**

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This report is available in hard copy or electronic format. A site license for a single physical location and a global license are also available. Publication is scheduled for the second half of April, with availability on or before April 30th.

## **About Greystone Associates**

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Greystone Associates is a medical technology consulting firm focused on medical market strategies, product commercialization, venture development, and market research. We assist medical market participants in achieving their business objectives through the creation of detailed business 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 necessary to refine and execute their marketing plans and achieve their financial targets.

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### Transdermal Skin Patches

Format	Price (US Funds)	Total
Electronic File	\$975.00	
Site License	\$1,850.00	
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