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F&S: IBD, IBS face severe unmet therapeutic need

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Singapore: A study by Frost & Sullivan titled, 'Analysis of the expanding US market for gastrointestinal disorders prescription pharmaceuticals' has highlighted that prescription pharmaceuticals indicated for inflammatory bowel disease (IBD) and irritable bowel syndrome (IBS) earned revenues of approximately $4.26 billion in 2011 and will reach $7.70 billion in 2017.

The report also pointed out that IBD and IBS represent two families of bowel disorders with a common denominator of significant unmet medical need. The main unmet need in IBD is disease modifying therapies with greater efficacy in order to slow disease progression and maintain remission, particularly for severe patients.

The study further revealed that the development pipeline is bursting with potential candidates to treat IBD. In comparison, however, the IBS pipeline is relatively dry as drug developers struggle to unwind the complex pathology behind this disorder. The main unmet need in IBS is effective therapies indicated specifically to alleviate the symptoms of this syndrome.

Ms Debbie Toscano, senior industry analyst, life sciences, Frost & Sullivan, said that, "Growth opportunities exist for biologicals and other novel agents, particularly for those that justify initiation of therapy earlier in the course of IBD, as well as for first line therapies that incorporate important improvements such as enhanced delivery or administration. There is also a tremendous need for safe and effective treatments for severe forms of IBS, which affects a very sizeable patient population."

Biological therapies such as tumor necrosis factor (TNF) inhibitors prove very effective in getting and keeping IBD patients in remission. However, these drugs are typically reserved for more severe patients, who have tried and failed the standard first line therapies such as aminosalicylates and steroids. However, knowledge gaps in the underlying pathology of these diseases impede the identification of new drug targets and development of agents with superior efficacy compared to available therapies. Patient adherence to complicated therapeutic regimens can also hinder market uptake.