

Sample content

Epilepsy

Disease Landscape & Forecast

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About Disease Landscape & Forecast

Disease Landscape & Forecast provides comprehensive market intelligence with world-class epidemiology, keen insight into current and emerging therapies, and drug forecasts supported by detailed primary and secondary research.



What are the sizes of the diagnosed, drug-treatable, and/or drug-treated populations?



What is the current treatment landscape?



What products are in development, and what is their launch potential and future positioning?



What is the market outlook of sales and patient share for the next 10 years?



What are the drivers and constraints of market growth, and what events will most impact the market's trajectory?



What unmet needs and opportunities exist?

Methodology and scope

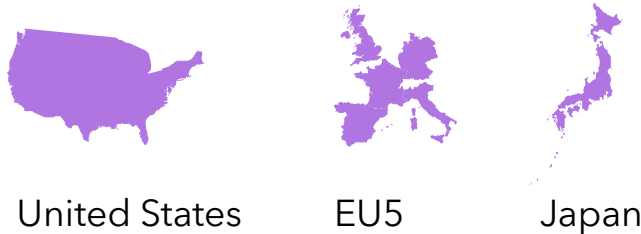
Market forecast

- **Forecast:** Annualized drug-level sales and patient share of key antiseizure therapies from 2023-2033, segmented by brands / generics.
- **Epidemiology:** Diagnosed prevalence of epilepsy by country and segmented by generalized, partial-onset seizures, and unknown-onset; drug-treated prevalent cases of epilepsy.
- **Additional content:** Downloadable Excel files containing detailed forecast assumptions and visual outputs.

Primary market research

- Interviews with 19 thought-leading neurologists across the G7.
- Data and insights leveraged from 210 physician surveys conducted by Clarivate in epilepsy to model current and future market dynamics.

Geography

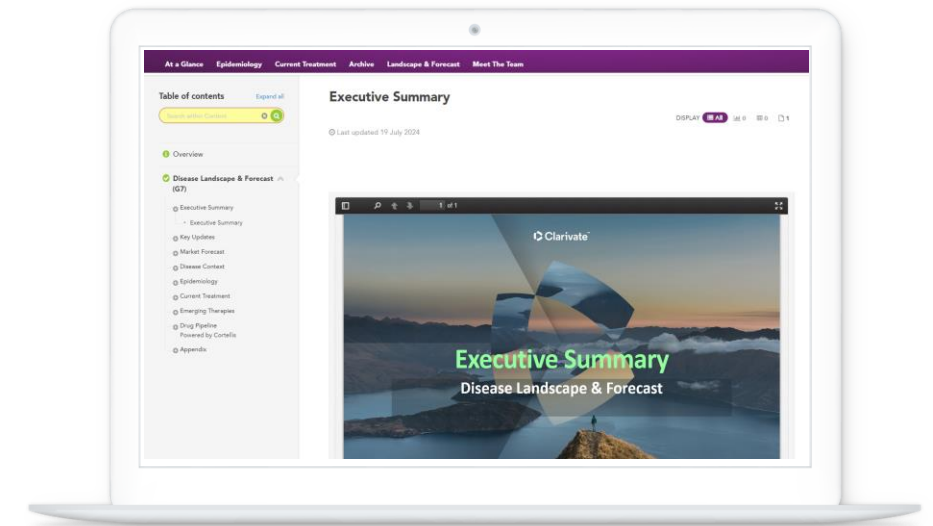


Key therapies covered

Phase 1/2	<ul style="list-style-type: none">• STK-001 (zorevunersen; Stoke Therapeutics)
Phase 3	<ul style="list-style-type: none">• Carisbamate (SK Biopharmaceuticals)• Soticlestat (Takeda)• Lorcaserin (Eisai)• XEN-1101 (azetukalner; Xenon Pharmaceuticals)• Staccato alprazolam (UCB / Engage)
Marketed	<ul style="list-style-type: none">• Briviact / Nubriveo (UCB)• Vimpat (UCB)• Epidiolex / Epidyolex (Jazz Pharmaceuticals)• Xcopri / Ontozry (SK Biopharmaceuticals)• Fintepla (UCB)• Eprontia (Azurity)• Zonisade (Azurity)

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Report format



In-depth written analyses available on Clarivate's Insights Platform or as a PDF download



Succinct **Executive Summary** deck



Market Forecast Assumptions (flat data file providing comprehensive view of the 10-year, annualized, patient-based market forecast assumptions, including a detailed methodology)



Market Forecast Dashboard (interactive tool to help understand, interpret, explore, and visualize key outputs from the market forecast)

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Question answered

What are the expected sales of key drugs used to treat epilepsy in the G7 markets over the next 10 years?

Sales (\$M)

Epilepsy	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
	1,074.91	1,147.24	1,218.79	1,289.46	1,359.18	1,428.89	1,498.61	1,568.32	1,638.04	1,707.75	1,777.47

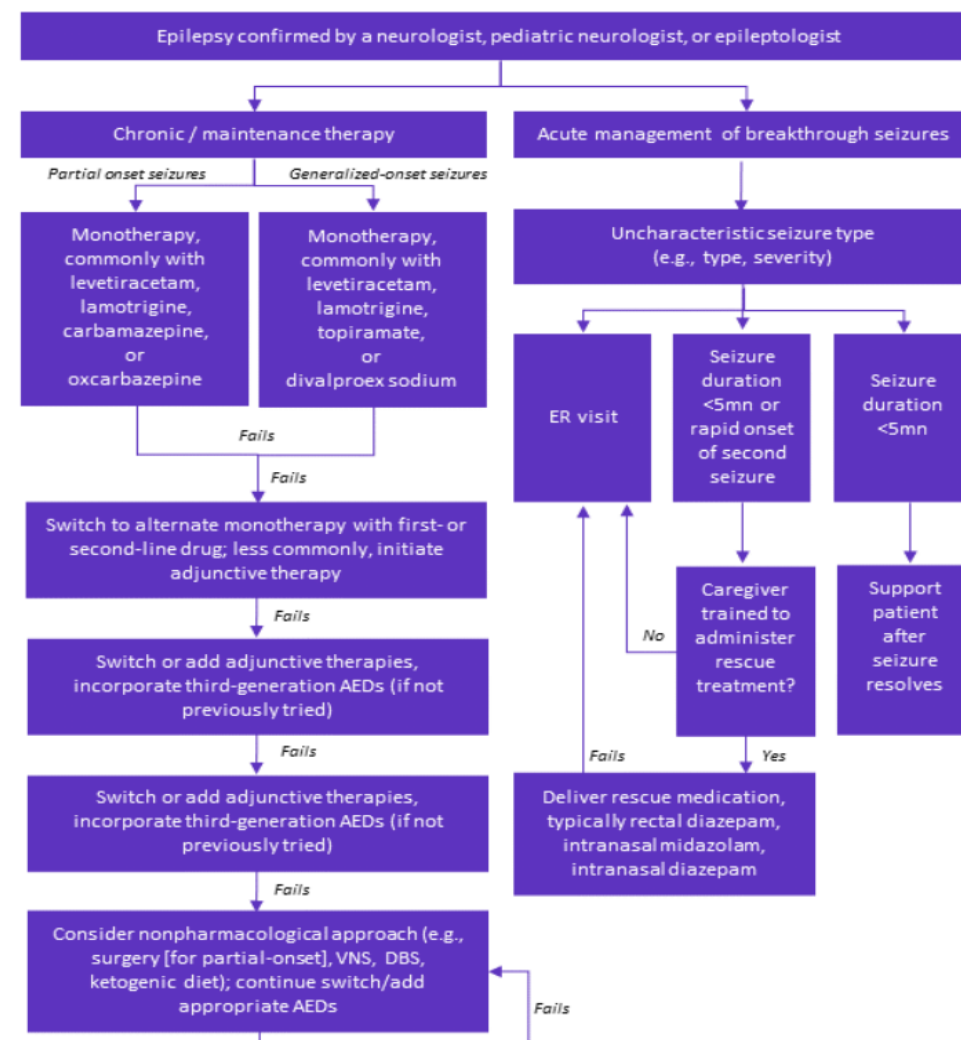
Regeneration.Mkt		1,074.91	1,147.24	1,218.79	1,289.46	1,359.18	1,428.89	1,498.61	1,568.32	1,638.04	1,707.75
Levetiracetam	Total	250.84	265.88	280.92	295.96	310.99	326.03	341.07	356.11	371.15	386.19
Levetiracetam	Branded	250.84	265.88	280.92	295.96	310.99	326.03	341.07	356.11	371.15	386.19
Levetiracetam	Generic	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Levetiracetam	Total	250.84	265.88	280.92	295.96	310.99	326.03	341.07	356.11	371.15	386.19



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Question answered

What is the current treatment paradigm in epilepsy? Who are the key influencers and what are the main endpoints explored in clinical trials?



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Question answered

When are the key novel therapies expected to launch for the epilepsy market over the next 10 years?

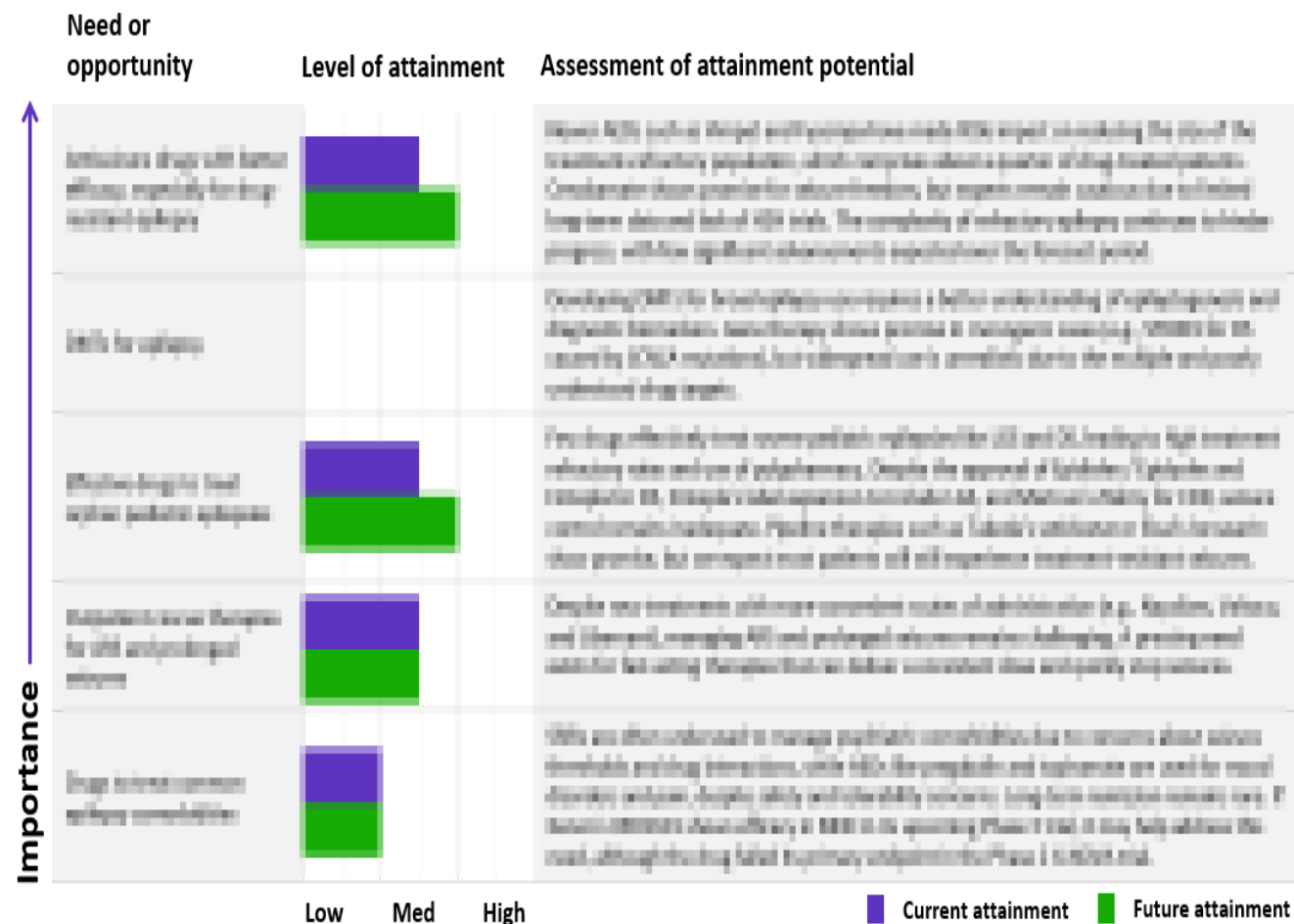
Forecast launch dates of key emerging therapies for the treatment of epilepsy: 2023-2033

Drug	United States	France	Germany	Italy	Spain	United Kingdom	Japan
XEN-1101	2027	2028	2028	2029	2029	2029	-
Carisbamate	2028	2028	2027	2028	2028	2028	-
Soticlestat	2027	2027	2027	2027	2027	2027	2027
Lacosamide	2028	-	-	-	-	-	-
Stavansetrigemine	2028	2028	2028	2027	2028	2028	2028
Ubrovelofen	2028	-	-	-	-	-	-
Enxantamipate	-	-	-	-	-	-	2028
Carbamazepine	-	-	-	-	-	-	2028

Note: Launch dates for emerging therapies are estimated based on an analysis of the product’s current phase and status of development, development timelines for the disease, region-specific regulatory timelines, and company reports. Launch dates reflect potential pricing and reimbursement delays in the individual markets.

Source: Clarivate

What clinical unmet needs remain unfulfilled and represent the top opportunities for drug developers?



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Question answered

How has the launch of fenfluramine impacted the dynamics of the epilepsy market?

Use and positioning in the treatment paradigm
<p>"We have had good experience with fenfluramine in DS. We have had patients who are seizure-free with increased motor function. As adults, we've seen the cognitive benefits. These patients who are already taking fenfluramine are free of other epileptics, which is very important for patients with DS. Individually we can use fenfluramine as the first agent. The results of using fenfluramine as a first agent are good." —Neurologist, Italy</p> <p>"Fenfluramine is a very good therapy for the treatment of CD and LGS. And I don't think it's the solution because it only treats the motor symptoms, not the intellectual disability, behavioral problems, or developmental delays. Fenfluramine was available through the early access program with security and now purchase being it. So, the hospital has to report about fenfluramine the experience based on efficacy given by the use of the drug." —Neurologist, Spain</p> <p>"Fenfluramine is extremely powerful in DS patients. I have seizure-free DS patients on fenfluramine who also showed improvements in their personality. However, in my overview of my patients, this dramatic response is seen in about 10% to 20% of the DS patients and not in the other patients, which is peculiar because, from the molecular genetic side, they are all the same. They are all SCN1A mutation patients. And I do not understand why some of those are dramatic responders and others are not." —Neurologist, Germany</p>
Clinical potential
<p>"So far, it's a complicated drug because of the psychological side effects, sedation, and so on. But sometimes the efficacy is surprisingly good in DS patients; whether this holds true for LGS, I'm quite hesitant to believe. We have to look for the data coming out, and now we have the approval study out there. In the approval studies, the efficacy was not as great as we have seen it in the approval studies in our Phase 2 studies in DS." —Neurologist, Germany</p> <p>"We need to monitor the potential cardiac side effect given the past evidence of problems on the cardiac system. We don't know whether this is a confirmed adverse effect. So, of course, we are monitoring patients on fenfluramine regularly with cardiac ultrasound. But so far, I've not had any significant safety problems." —Neurologist, United Kingdom</p>
Limitations
<p>"The main limiting factor for the use of fenfluramine in children is the risk of side effects. It is not clear whether they are as limited because of the risk of side effects, and the benefit is limited only after the age of 2." —Neurologist, United Kingdom</p> <p>"The problem is that the change in function is limited to motor system effects on the brain. In adults, we would probably need a new drug that can be limited to higher changes. Fenfluramine is not as good in adults as it is in children. But it is an interesting discovery for the treatment." —Neurologist, Germany</p> <p>"The drawback of fenfluramine in my country is clearly the price. In Germany, you need a special license to be allowed to prescribe it. The major challenge might be that you need neurophysiology in patients prior to administering</p>



About Clarivate

Disease Intelligence and Analytics

Disease intelligence you can trust



Size your market

Understand global and local markets, by gauging the size of the drug treatable population, where they're located, and how populations will change over time.



Identify unmet needs

Identify areas of unmet need and direct your clinical development strategy to the areas with the greatest opportunity.



Fuel successful market access

Optimize your market access strategy with brand-level insight regarding the impact of payer policy on physician prescribing behavior.



Assess and prioritize opportunities

Evaluate market potential for your assets – and those of your competitors – and optimize your strategy with indication-specific market intelligence combined with world-class epidemiology.



Understand the patient journey

Gain visibility into brand usage by line of therapy with RWD and uncover the 'why' behind treatment pathways and brand usage with in-depth coverage of physician perceptions on disease management.



Optimize your brand positioning

Analyze treatment pathways across highly dynamic oncology indications to support brand positioning, strategic planning, and business development.

Find out more

Learn more about how Clarivate can help you maximize your market share:

clarivate.com/products/biopharma/portfolio-strategy-business-development



Think forward™

Contact our experts today:
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About Clarivate

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