The ophthalmology market, although a relatively small niche in the pharmaceutical industry, is more than worthwhile to track for multiple reasons:

• It is growing dynamically, and will likely continue this development unbroken for the next 2 or 3 decades.

• It offers scientific challenges that are definitely tough but not insurmountable, with the paths to success already discernible.

Continued on next page
Overview

- It is a market that analysts and investors can understand. Severe eye diseases are debilitating but not terminal conditions, and therefore most people know at least 1 person with severe vision impairment and can sympathize—which on the whole creates a more favorable basis for investments.

Ophthalmological Therapeutics: Pipelines, Delivery Technologies, and Markets provides a cutting-edge review of the challenges, achievements, and perspectives that characterize the inseparable therapeutic triad of ophthalmological pharmacology, surgery of the visual tract, and implantable ophthalmological medical devices. At annual sales of less than $10 billion, this is a niche segment by the standards of the drug industry; however, it is a highly prestigious and profitable field. Because nothing that concerns intervention with the visual system is trivial, highly innovative specialist companies dominate development programs that are part of the growing field.

Specifically, this report covers:

- A thorough therapeutic pipeline analysis
- Company profiles, including shifts in the corporate landscape since 2000
- A full discussion of eye disorders and potential treatments
- Current market dynamics
- Market predictions through 2015
- Expert commentary from leaders in the field

The market for prescription drugs to treat eye disorders will experience considerable and consistent growth throughout the next 10 years. The partial table below shows some of the research and development programs that are part of the growing field.

With its complexity and sensitivity—and with its tremendous importance to the quality of human life—the eye offers a broad range of challenges to pharmaceutical, surgical, and prosthetic science. Ophthalmological Therapeutics: Pipelines, Delivery Technologies, and Markets discusses in detail all the aspects that make the ophthalmology market fascinating, promising, and profitable.

Table 3.2. Advanced Drug Candidates for Dry Eye Syndrome

<table>
<thead>
<tr>
<th>Product Name and Developer</th>
<th>Active Principle</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rebamipide (Novartis)</td>
<td>2(1H)quinolone derivative</td>
<td>Phase III ongoing</td>
</tr>
<tr>
<td>Ecaledet sodium (ISTA Pharmaceuticals)</td>
<td>12-Sulfodehydroascorbic acid (natural phenanthrene-type compound)</td>
<td>Phase IIb concluded</td>
</tr>
<tr>
<td>IDESTRIN (NP50301) (Nascent Pharmaceuticals)</td>
<td>17beta-estradiol ester</td>
<td>Phase IIb concluded</td>
</tr>
<tr>
<td>Prolactin (Inspire / Allergan / Santen)</td>
<td>Diquafosol (P2Y2 receptor agonist)</td>
<td>Phase III concl</td>
</tr>
<tr>
<td>Velacosa (Novagali Pharma)</td>
<td>Cyclosporine</td>
<td>Phase III concl</td>
</tr>
</tbody>
</table>

Source: H.M. Pharma Consultancy

About the Author: Hermann A.M. Mucke, PhD, spent 17 years in academia and industry before he founded H.M. Pharma Consultancy (www.hmpharmacon.com) in 2000 to become an independent pharmaceutical consultant, analyst, and science author. His last industry position was Vice President R&D in a European pharmaceutical company, which he helped to take public on the Frankfurt Stock Exchange in 1999. Since then, Dr. Mucke, who holds a PhD in biochemistry from the University of Vienna (Austria), became a consultant and advisory board member for several European and American pharmaceutical companies and a regular reviewer of drugs and patents for Thomson Current Drugs and Ashley Publications. Dr. Mucke is based in Vienna.

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Samuel Reich, Executive Vice President of Ophthalmologics, OPKO Health, Miami, FL
Roger Vogel, MD, Co-founder and Chief Medical Officer, Sirion Therapeutics, Tampa, FL

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Recent developments reflect the explosion in the number of kinase inhibitors that have entered clinical development in the past few years:

- By the end of 2006, seven kinase inhibitors had reached the market, three in the period from December 2005-December 2006.
- Their collective sales exceeded $4 billion.
- Three more kinase inhibitors have been approved in 2007.
- In addition to ongoing studies of approved kinase inhibitors seeking line extensions, a further 11 are in Phase III studies.
- More than 130 kinase inhibitors are reported to be in either Phase I or Phase II clinical development, with 47 reported to be in Phase II studies.

This report reviews the considerable array of drug development efforts directed at kinases and:

- Provides profiles of the activities of the major companies as well as the kinase inhibitors in development, and some of the specialist companies active in the field
- Assesses the potential impact of the more advanced kinase inhibitors, which offer significant market potential.
- Discusses some of the technical challenges faced in developing such inhibitors.
- Concludes with commentaries from leading experts in the field.

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**Ophthalmological Therapeutics: Pipelines, Delivery Technologies, and Markets**

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<td>$3,750.00</td>
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<td>$2,995.00</td>
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