

Oral Long-Acting Opioids for Pain

Insight and Outlook from IMS Health

Pain is a disabling symptom that usually follows a medical condition and can occur at any point during the course of an illness. Pain management represents an important societal burden and a continual challenge for physicians. During the last few years, the market has been mainly oriented toward the enhancement of available drugs, with the development of extended-release formulations and drug combinations.

Oral long-acting opioids (LAOs) have been shown to be effective for the relief of pain of mild to severe intensity that requires the use of an opioid analgesic for several days or more. Several oral LAOs are currently available in Canada; most are “branded generics,” generally referring to a generic product that has been developed into a new formulation

which allows it to be marketed as a brand drug. However, there are also some generic versions of long-acting morphine sulfate. New dosages of oxycodone (15 mg, 30 mg and 60 mg) and formulations of tramadol (Ralivia, Tridural and Zytram XL) are the most recently launched oral LAOs.

Opioids can be classified as weak or strong according to their potency to induce an analgesic effect. Any given opioid, when dosed high enough, will decrease most types of pain. However, a higher dosage of a weak opioid will be required than that of a strong opioid to obtain equivalent levels of analgesia.

Oral LAOs are an option to treat acute pain in non-dependant patients with pain of moderate to severe

intensity. Their use is recommended if pain is not adequately controlled with an NSAID. However, long-acting formulations may not provide rapid pain control due to the time delay to reach a therapeutic benefit.

THE CANADIAN MARKET FOR ORAL PAIN MEDICATIONS

A large number of drugs are available to inhibit pain. Figure 1 shows the percentage of total retail prescriptions for oral pain medications for the 12 months ending November 2009. Oral LAOs accounted for 8.5% of the 42 million prescriptions for oral pain medications.

For the same period, total drug-store and hospital purchases for oral pain medications reached \$1.1 billion. Oral LAOs captured 32% of total purchases of pain inhibitor

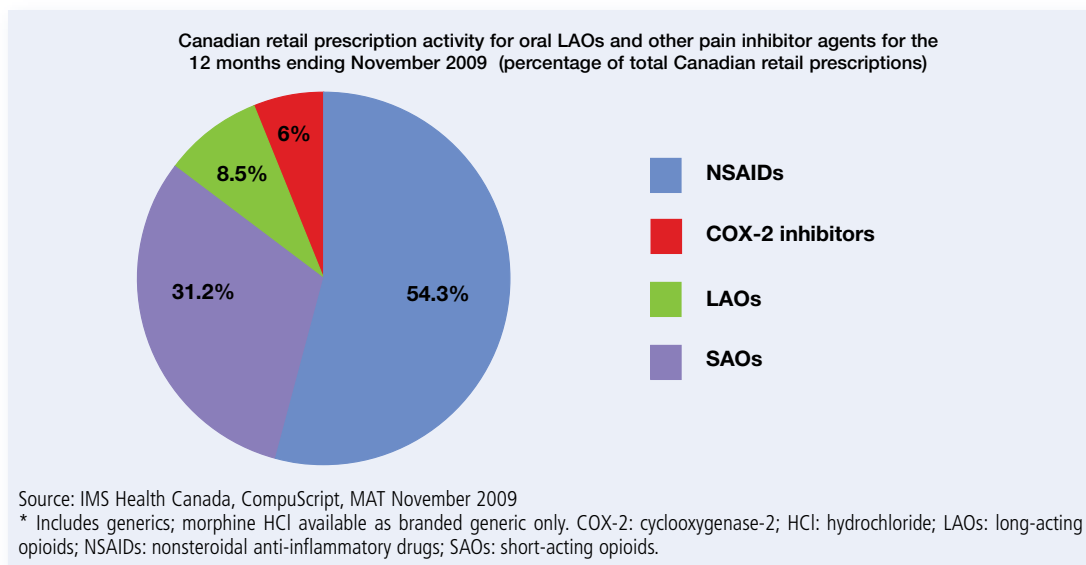


Figure 1. Canadian retail prescription activity for oral LAOs and other pain inhibitor agents for the 12 months ending November 2009 (percentage of total Canadian retail prescriptions).

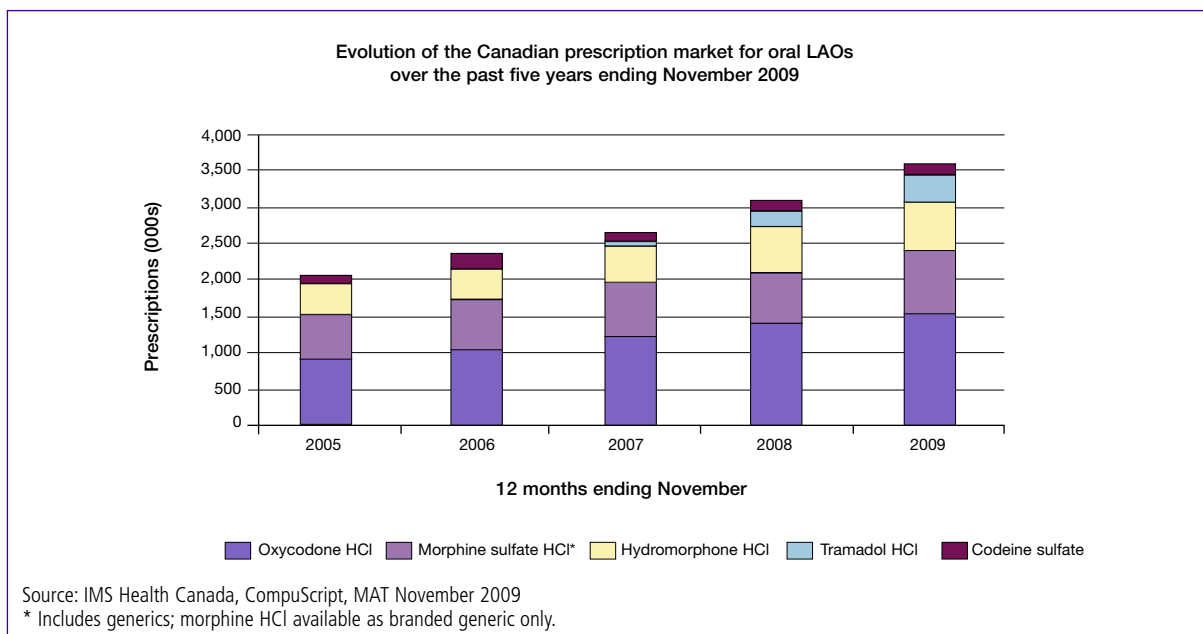


Figure 2. Evolution of the Canadian market for oral LAOs over the past five years ending November 2009.

agents, equivalent to \$346 million. OxyContin was the market leader with \$210 million in sales. OxyContin also ranked eighth on the list of top 50 highest selling medicines for the period January to November 2009.

Its popularity may be linked to its unique biphasic absorption profile, providing analgesia in a rapid phase similar to immediate-release oxycodone and a slow phase. Although short-acting opioids were dispensed nearly four times more frequently than LAOs, the purchase value of LAOs was about twice that of short-acting opioids.

The Canadian market for oral LAOs has steadily increased over the last five years in terms of retail prescriptions (Figure 2). Retail prescriptions increased by 72% from approximately 2.1 million in the 12 months ending November 2005 to 3.6 million for the 12 months ending November 2009. In parallel, drugstore and hospital purchases increased from \$203.9 million to \$346.4 million over the same period.

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KEY POINTS

- Oral long-acting opioids (LAOs) are used for pain of mild to severe intensity requiring treatment for several days or more
- New dosages of oxycodone and long-acting formulations of tramadol are the most recent additions to the Canadian oral LAO market
- According to the Chronic Pain Association of Canada, it is estimated that the overall cost of pain, including medical expenses, lost income and lost productivity, exceeds \$10 billion annually in Canada
- For the 12 months ending November 2009, oral LAOs represented approximately 9% of retail prescriptions for pain and accounted for \$346 million in drugstore and hospital purchases
- OxyContin ranked eighth on the list of top 50 highest selling medicines in Canada for January to November 2009 and is the oral LAO market leader with \$210 million in drugstore and hospital purchases

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