

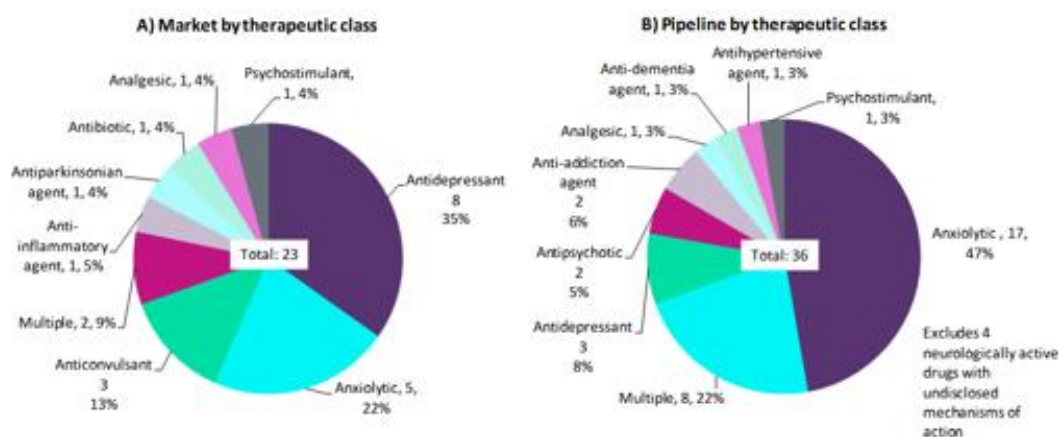
Greater focus on comorbid disorders in PTSD pipeline

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Post-traumatic stress disorder (PTSD) is a psychiatric illness that can occur in people after a traumatic event. These events often feature displays of extreme violence such as sexual or physical assault, or near-death experiences such as surviving a natural disaster and can cause severe emotional and physical disruption to the victim's life. Symptoms typically involve "re-experiencing" the event through flashbacks, memories, thoughts and dreams. These symptoms are often accompanied by hyperarousal, pupil dilation, muscle tremors and sweating. A significant stress response is activated by triggers, which are sensory cues that cause a PTSD patient to feel as if the event is occurring again. Many patients cope by avoiding triggers, a behavioural pattern referred to as hypervigilance.

PTSD is an indication with limited pharmacological treatment options. Reliance on psychotherapy alone has been deemed as insufficient for the majority of people with the condition. It is estimated that up to 80% of PTSD patients have a comorbid disorder, with the most common comorbidities being depression, anxiety, alcohol addiction, and substance abuse. There are 23 distinct marketed products for the treatment of PTSD, as seen below.

Overview of global PTSD market and pipeline products by a therapeutic mechanism of action, March 2019



Antidepressants, anxiolytics, and anticonvulsants make up the vast majority (69.6%) of marketed products. Although there are fewer products in the market than in the pipeline, the focus of marketed products is on mitigating periods of anxiety, mood swings and agitation.

A similar trend can be observed in the pipeline where anxiolytics and antidepressants make up 55.6% of products with a disclosed mechanism of action. However, pipeline products aimed at treating substance abuse, promoting neuro-regeneration, and reducing hypertension mean that physicians who currently prescribe off-label products to address insomnia, tachycardia, memory impairment and high blood pressure may soon have a wider selection of more effective medicines to treat conditions that are frequently comorbid with PTSD.

In the fifth edition of the Diagnostic and Statistical Manual of Mental Disorders, PTSD was recategorised and moved from the classification of anxiety disorders into the category of "trauma and stressor" disorders. This was suggested to improve the diagnosis and treatment of PTSD, as anxiety is not the only determinant of PTSD.

In treating comorbidity, GlobalData expects that pipeline agents are more likely to have improved rates of compliance among patients with PTSD, increasing the efficacy of concomitant psychotherapy. This will reduce the occurrence of the life-threatening consequences of untreated depression, which has been characterised with reference to the failed attempts to rehabilitate victims of extremely violent and aggressive acts.