OVERVIEW

Catalyst
Summary

EXECUTIVE SUMMARY

Strategic scoping and focus
Datamonitor insight into the spinal cord injury market
Upcoming reports

SPINAL CORD INJURY: PATIENT POTENTIAL

Key findings
Definition of spinal cord injury
Classification of spinal cord injury
Etiology of spinal cord injury
Road traffic accidents are the leading cause of SCI in developed countries
Pathophysiology of spinal cord injury
Primary injury
Secondary injury
Diagnosis of spinal cord injury
Epidemiology of spinal cord injury
Seven major markets
Rest of the world
Epidemiological trends in spinal cord injury
Economic consequences of spinal cord injury

CURRENT TREATMENT PRACTICES AND UNMET NEEDS

Key findings
Current management of spinal cord injury
Surgery
Methylprednisolone is a pharmacological treatment option for acute spinal cord injury
Rehabilitation
Patient care path
The acute hospital setting is the key intervention point for neuroprotective treatments
For manufacturers of neurorestorative treatments, rehabilitation and community settings are key targets
Further opportunities exist in the management of complications of SCI
Unmet need in spinal cord injury
Neurorestorative treatments
Neuroprotective treatments
Symptomatic treatments

MARKET POTENTIAL

Key findings
Datamonitor’s estimate of market potential
Spinal cord injury: opportunities and threats

Opportunities

Threats

PIPELINE ANALYSIS

Key findings

Clinical trial design in spinal cord injury

ICCP guidelines for the conduct of clinical trials in spinal cord injury

Clinical pipeline overview

Novartis represents the only Big Pharma company in the sparse clinical pipeline for SCI

The pipeline is dominated by neurorestorative treatments for acute SCI

Cethrin (BA-210; Alseres Pharmaceuticals)

Drug profile: intraoperatively administered Rho GTPase protein inhibitor

Development overview

Product positioning

SWOT analysis

XP19986 (arbaclofen placarbil; Xenoport)

Drug profile: GABA receptor agonist in Phase II development for spasticity due to SCI

Development overview

Product positioning

SWOT analysis

ProCord (Proneuron Biotechnologies)

Drug profile: autologous blood-derived macrophage therapy for the treatment of acute SCI

Development overview

Product positioning

ATI355 (reticulin 4 monoclonal antibody; Novartis AG)

Drug profile: first human monoclonal antibody to neutralize Nogo-A

Development overview

Product positioning

Autologous Combination Stem Cell Therapy (TCA Cellular Therapy)

SCI represents the least advanced indication for Autologous Combination Stem Cell Therapy

Astrostem (RNL Bio)

Human clinical study of Astrostem approved by Korean FDA in April 2009

Neu2000 (Neurotech Pharmaceuticals)

Improved locomotor outcomes associated with Neu2000 in rat model of moderate SCI

Cordaneurin (Spinal Cord Therapeutics)

Cordaneurin prevents the formation of growth inhibiting scars

Preclinical pipeline overview
Spinal Cord Therapeutics and SanBio represent key developers in the preclinical SCI pipeline

Initiation of world’s first human clinical trial of embryonic stem cell-based therapy is expected in Q3 2010

Neureva is presently seeking a co-development partner for NVA0011 (gacyclidine)

Discontinued pipeline candidates for spinal cord injury

The future of treatment in spinal cord injury

Key opinion leaders view partially restorative therapies to be the most likely advance in the mid-term

Combination treatments offer the greatest potential according to key opinion leaders

Geographical availability of efficacious SCI treatments will be limited by expertise of physicians and cost

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