

For Immediate Release

For More Information:
Front Line Strategic Consulting, Inc.
650-525-1500
Stan Shelsta (x145)
Al Manzano (x135)
stan@frontlinesmc.com
al@frontlinesmc.com

PAIN MANAGEMENT MARKET ESTIMATED TO REACH \$29.8B BY 2008

Growth spurred by 27 new drugs entering the pain management market by 2008

April 2, 2003, San Mateo, Calif.—Front Line Strategic Consulting, Inc., a leader in strategic consulting and market analysis for the life sciences industries, today announced the completion of its new Strategic Market Report™ series, ***Pain Management Therapeutics***. Front Line's report includes an in-depth analysis of current and emerging pain management therapeutics, key companies, and the future market. The worldwide pain management market is projected to experience a 10% overall compound annual growth rate (CAGR) through 2008. Nonsteroidal anti-inflammatory drugs (NSAIDs), estimated current 45.2% market share, account for the largest market segment. The U.S.'s 72% market share is due to the majority of drugs being launched in the U.S. first.

“Largely dominated by narcotics and NSAIDs, the pain management market has great potential in emerging therapeutics to treat patients who don't respond well to conventional pain medications,” said Charles Chang, analyst, strategic market reports for Front Line Strategic Consulting, Inc.

Current pain management drugs include antimigraines, narcotics, non-steroidal anti-inflammatory drugs (NSAIDs), and others (such as ion flux inhibitors and tetraphosphonate chelating agents). Pfizer's Bextra and Merck's Arcoxia are two recently released second generation COX-2 inhibitors that address the gastrointestinal side effect issues of other NSAIDs. In this report, Front Line analyzes 27 compounds in

end-stage development (Phase III or later) in terms of clinical outcomes and market attractiveness. Of those evaluated, DURECT's Chronogesic™ and Elan's Prial™ are among many promising drugs that will likely become available within the next five years.

The current trends in the pain management market include widening the range of drug classes under development, focusing on reducing side effects, and increasing interest in neuropathic pain management. Pfizer's Pregabalin is set to launch in the near future and will likely impact the future neuropathic pain market.

About Front Line

Headquartered in San Mateo, Calif., Front Line is a leader in strategic consulting and market analysis for the Life Sciences industries, offering strategic business intelligence through exclusive consulting engagements and comprehensive strategic market reports of key therapeutic and technology areas. Front Line was founded in 1992 and specializes in combining diligent research methodology with intelligent strategic planning for their pharmaceutical and biotechnology customers. www.frontlinesmc.com

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