



Medical Marijuana: Innovative Pipeline Shows Promise For Treating More Than 80 Indications

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Medical Marijuana

GlobalData's Medical Marijuana report includes an assessment of ongoing clinical trials, the geographical location of trial sponsors, discussion of the key players in the medical marijuana space as well as insights from industry experts discussing market challenges and considerations of stakeholders in the arena. Unmet needs include the high annual cost of therapy (ACOT) of approved drugs, lack of treatment guidelines, dispelling falsehoods perpetuated by anecdotal and popular news sources, challenges conducting research with controlled substances and the difficulty navigating the dynamic regulatory landscape which differs between countries.

Pipeline analysis

Comprehensive data and discussion of emerging trends, the significance of the endocannabinoid system in various conditions, the route of administration of pipeline agents and the markets in which the drugs are expected to launch. Discussion of late-stage pipeline products including a sales forecast from 2018-2025

Key Trends

Analysis of the current and future market competition in the global medical marijuana therapeutics market. Insightful review of the key industry drivers, restraints and challenges. Each trend is independently researched to provide qualitative analysis of its implications.

Epidemiology

In-depth analysis of diseases where at least one medical marijuana product is used in clinical practice

Medical Marijuana

What Is Medical Marijuana?

- Marijuana or cannabis is a psychotropic chemical substance sourced from flowering plants of the cannabis genus. Marijuana plants are endemic to regions of Central and Southern Asia. These plants contain cannabinoids, which are chemical compounds that bind to cannabinoid receptors.
- From GlobalData's primary and secondary research, it was established that there is no universally accepted definition of medical marijuana.
- According to the National Institute on Drug Abuse (NIDA): "Medical marijuana refers to using the whole, unprocessed marijuana plant or its basic extracts to treat symptoms of illness and other conditions."

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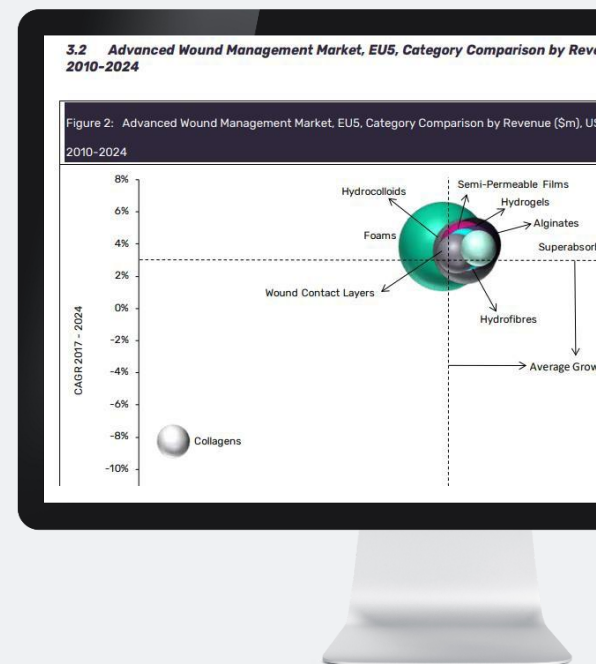
Key Questions Answered in This Report

Study Design

Two 10-minute surveys were launched in October 2019 and results were compiled in November 2019. One survey was distributed to prescribing physicians and the other survey was answered by the general public from the markets covered in this report (US, 5EU, Canada, Israel, and Australia). The prescriber survey was answered by neurologists and psychiatrists because these doctors treat the majority of diseases for which medical marijuana products are being developed. The consumer survey examined societal perceptions of medical marijuana, preferences for the route and frequency of administration of these therapeutics, and what measures could be taken to improve uptake of products entering the market. GlobalData interviewed KOLs and industry experts with direct involvement in the development of marketed and pipeline medical marijuana products.

Key Questions Answered:

- What was the value of the medical marijuana market in 2018?
- What challenges do biopharmaceutical companies developing medical marijuana therapeutics face that are unique to this field?
- Which patients do prescribing physicians think are most likely to benefit from treatment with medical marijuana?
- What are the concerns and perceptions of prescribers and potential consumers of medical marijuana across the nine markets covered in this report?
- What are the unmet needs in the medical marijuana market and what opportunities remain for industry players?



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Medical Marijuana: Abbreviations (1/2)

2-AGE	2-arachidonyl glyceryl ether
2-AG	2-arachidonoylglycerol
5EU	Five major European markets (France, Germany, Italy, Spain, and UK)
ACMPR	Access to Cannabis for Medical Purposes Regulations
ACOT	Annual Cost of Therapy
ACT	Australia Capital Territory
AEMPS	Spanish Agency of Medicines and Medical Devices
AFSSAPS	Agence Française de Sécurité Sanitaire des Produits de Santé
AIDS	Acquired Immune Deficiency Syndrome
AIFA	Agenzia Italiana del Farmaco (Italian Medicines Agency)
ANSM	Agence nationale de sécurité du médicament (National Agency of Medicine and Health Product Safety)
AUD	Australian Dollar
BfArM	Federal Institute for Drugs and Medical Devices
BMO	Bank of Montreal
BRE	Benign Rolandic Epilepsy
BtM	Betäubungsmittel
CAD	Canadian Dollar
CAE	Childhood Absence Epilepsy
CAGR	Compound Annual Growth Rate
cAMP	Cyclic adenosine monophosphate
CB1	Cannabinoid Receptor 1
CB2	Cannabinoid Receptor 2
CBD	Cannabidiol
CBT	Cognitive Behavioral Therapy
CFT	Conjoint Family Therapy
CNS	Central nervous system
CRT	Cognitive Remediation Therapy
CS	Cost-Sharing
CT	Computed Tomography
DEA	Drug Enforcement Administration
DS	Dravet Syndrome

Medical Marijuana: Abbreviations (2/2)

EDI-2	Eating Disorder Inventory Scale	NIDA	National Institute on Drug Abuse
EEG	Electroencephalogram(s)	NRS	Numeric Rating Scale
GABA	<i>gamma</i> -aminobutyric Acid	NSAIDs	Non-Steroidal Anti-Inflammatory Drugs
G-BA	Gemeinsamer Bundesausschuss	OUS	Key Opinion Leader Based Outside of the US
GMP	Good Manufacturing Practices	PBR	Payment by Result
GPCR	G-Protein Coupled Receptor	PBS	Pharmaceutical Benefits Scheme
GPR55	G protein-coupled receptor 55	PDD	Pervasive Development Disorder(s)
Gβγ	G beta-gamma	PEA	Palmitoylethanolamide
HAS	Haute Autorité de Santé	PET	Positron Emission Tomography
HHS	US Department of Health and Human Services	PMPRB	Patented Medicine Prices Review Board
HIV	Human Immunodeficiency Virus	PTSD	Post-traumatic stress disorder
IASP	International Association for the Study of Pain	ROA	Route of Administration
IBS	Irritable Bowel Syndrome	SAS	Special Access Scheme
IFR	Individual Funding Request	SCFM	Stabilimento Chimico Farmaceutico Militare
ILAE	International League Against Epilepsy	SM	Small Molecule
ILS	New Israeli Shekel	SSN	Servizio Sanitario Nazionale
IMCA	Israeli Ministry of Health	SWOT	Strengths, Weaknesses, Opportunities, and Threats
IQWiG	Institute for Quality and Efficiency in Health Care	TGA	Therapeutic Goods Administration
IRCCS	Scientific Institute for Cancer Research	THC	Tetrahydrocannabinol
JME	Juvenile Myoclonic Epilepsy	TRPV	Transient Receptor Potential Cation Channels
KOL	Key Opinion Leader	UHC	Universal Health Coverage
LGS	Lennox-Gastaut Syndrome	USD	US Dollar
M&A	Mergers and Acquisitions	WHO	World Health Organization
MAP	Mitogen-activated protein		
MHRA	Medicines and Healthcare products Regulatory Agency		
MM	Medical Marijuana		
MRA	Mutual Recognition Agreement		
MRI	Magnetic Resonance Imaging		
NHS	National Health Service		
NICE	National Institute for Health and Care Excellence		

About GlobalData

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“From the very initial contact until now, GlobalData has been a great partner for us in accessing not just market revenue data, but also clinical trial information that has been a huge resource for us.

GlobalData fits right into our lean operating model without compromising the breadth and depth of research material.”

Medical Company