

## Pharma Trax



SALES, MARKETING,  
AND R&D TRENDS AFFECTING  
THE HEALTHCARE INDUSTRY

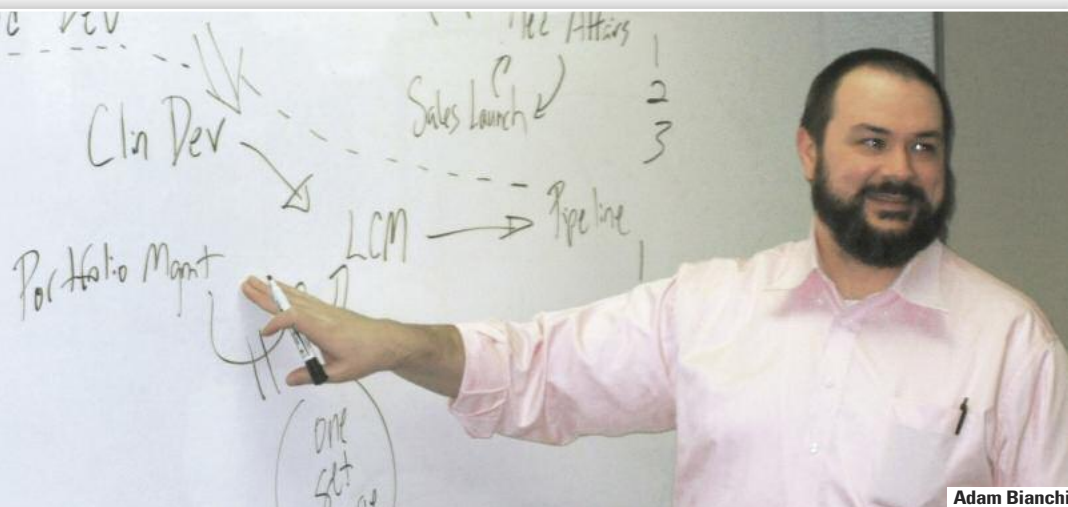
By Carolyn Gretton



Pharma Turning to

# Health Outcomes Liaison Teams

**TREND:** Trailblazing pharma companies are assembling elite health outcomes liaison (HOL) teams focused on market access priorities and supporting these groups with extensive resources and quality ongoing training.



Adam Bianchi

**H**ealth outcomes liaisons (HOLs) forge connections with key target audiences by communicating critical health economics and outcomes research (HEOR) data. According to a recent Cutting Edge Information study, Health Outcomes Liaisons: Managing a Field-Based Team that Speaks the Payer's Language, most HOL team budgets fall between \$1.5 million and \$3.5 million, with a few larger HOL teams in the United States requiring budgets of more than \$7 million. In most markets outside the United States, HOL team budgets peak at \$1.5 million, according to the report.

In some cases, a single group manages the disbursement of both clinical information to key opinion leaders (KOLs) and outcomes-based information to payers. This arrangement can be challenging, however, because communications to these two groups are governed by different sets of regulatory rules, the report says. Additionally, the skill sets needed to communicate clinical and outcomes-based research are similar, but not identical.

"In truth, there is no standard structure for HOL groups," says Adam Bianchi, chief operating officer at Cutting Edge Information. "The test, especially for companies with dedicated outcomes liaison teams, is reducing communication challenges with payer clients."

At some companies, according to interviewed executives, HOLs serve the same clients as medical science liaison (MSL) teams. This arrangement can make it more challenging to justify a stand-alone HOL group. One executive quoted in the report said he had seen HOL groups created and then dismantled.

▼ For more information, visit [cuttingedgeinfo.com](http://cuttingedgeinfo.com).

## Epigenetic Therapies Market

### EXPECTED TO SURGE

According to Visiongain data, world revenue for epigenetic therapies and technologies will reach \$2.73 billion in 2015, driven by strong uptake of

drug discovery and research tools.

The Visiongain report, Epigenetic Therapies and Technologies: World Market Prospects 2011-2021, projects the overall market will post a compound annual growth rate (CAGR) of 16% between 2010 and 2015, with therapies remaining

the largest source of revenue in the epigenetics market. The four products currently available in this category, including Celgene's Vidaza, generated global revenue totaling \$760 million in 2010.



Richard Lang

"Epigenetics is an exciting and fast-growing area of research; in little more than a decade, the field has moved from early research to the development of second-generation therapies," says Richard Lang, pharmaceutical industry analyst for Visiongain.

▼ For more information, visit [visiongain.com](http://visiongain.com).

## E-Sampling Gaining Strength

### AMONG PHARMA REPS

According to the PDMA Compliance Perspectives Benchmark conducted by TGaS Advisors and PDMA Alliance, e-sampling is one of the faster-growing segments in direct-to-physician activities, with 44% of companies surveyed currently using this as one of their alternative sampling methods.

The study found that overall potential industry trends over the next three years indicate that as regulations continue to increase, the job of managing and monitoring sampling will become more complex.

▼ For more information, visit [tgas.com](http://tgas.com).

## Life-Sciences Venture

### CAPITAL FUNDING TAKES A TUMBLE

Following two quarters of growth, venture capital (VC) funding in the life-sciences sector, which includes the biotechnology and medical device industries, fell 18% during the third quarter of 2011.

According to the recent PwC U.S. report, Reaching for Growth, venture capitalists invested \$1.8 billion in 170 life-sciences deals, reflecting a continued interest in venture investment but still the lowest number of deals since the first quarter of 2009. Investment in the life-sciences sector increased 22% year over year, but dollars invested and deal volume declined 18% and 21%, respectively, compared with the \$2.2 billion invested in 214 deals during the previous quarter.

▼ For more information, visit [pwc.com](http://pwc.com)



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**THERAPEUTIC MARKET FAST TRAX...**

**AUTOIMMUNE**

Valued at \$32.3 billion in 2002, the global anti-inflammatory therapeutics market grew at a CAGR of 7.6% to reach \$57.8 billion in 2010. But the CAGR is expected to slow over the period between 2010 and 2017 because of patent expiries of both biologic and small-molecule drugs.

Source: GBI Research, Anti-Inflammatory Therapeutics Market to 2017 — Respiratory Diseases and Arthritis Continue to Dominate.

For more information, visit [gbiresearch.com](http://gbiresearch.com).

The global systemic lupus erythematosus (SLE) therapeutics market was estimated to be \$256 million in 2010, with projected CAGR of 24.7% to reach \$1.6 billion in 2018.

Source: GlobalData, Systemic Lupus Erythematosus Therapeutics (SLE) - Pipeline Assessment and Market Forecasts to 2018.

For more information, visit [globaldata.com](http://globaldata.com).

**CANCER**

The global cancer vaccines market was valued at \$3.48 billion in 2010, after increasing at a CAGR of 63.7% during the 2006-to-2010 period. During the period from 2010 to 2018, the market is expected to record a CAGR of 12.7%, to reach \$9.08 billion by 2018, with growth attributed to the increasing patient population with cancer.

Source: GlobalData, Cancer Vaccines — Pipeline Assessment and Market Forecasts to 2018.

For more information, visit [globaldata.com](http://globaldata.com).

The global glioblastoma multiforme (GBM) therapeutics market was valued at \$370 million in 2010 and is forecast to grow at a CAGR of 2.4% to reach \$449 million by 2018. This low growth rate is primarily attributed to the patent expiry of Temodal/Temodar in Europe in 2009 and in the United States in 2014.

Source: GlobalData, Glioblastoma Multiforme (GBM) Therapeutics - Pipeline Assessment and Market Forecasts to 2018.

For more information, visit [globaldata.com](http://globaldata.com). In 2008, there were about 1.6 million reported new cases of lung cancer globally, and 1.4 million deaths (almost 20% of all cancer deaths) caused by this disease. Five-year survival rates are also low (15% to 20%) compared with other cancers. The needs of patients and the high burden of lung cancer are drivers for the development of new therapies.

Source: Biopharm Reports, Lung Cancer Vaccines: Pipeline, Strategies and Clinical.

For more information, visit [biopharmreports.com](http://biopharmreports.com).

The multiple myeloma therapeutics market was estimated to be valued at \$3.4 billion in 2010 and is forecast to grow at a CAGR of 7.1% to reach \$6 billion by 2018. Growth is primarily attributable to the increased uptake of Millennium: The Takeda Oncology Company's Velcade (bortezomib) and Celgene's Revlimid (lenalidomide).

Source: GlobalData, Multiple Myeloma Therapeutics - Pipeline Assessment and Market Forecasts to 2018.

For more information, visit [globaldata.com](http://globaldata.com).

Tyrosine kinase inhibitors such as Novartis Oncology's Gleevec and Bayer HealthCare's Nexavar represent the fastest growing segment in the market for cancer treatments and have boosted the performance of many pharmaceutical companies. The world market for cancer therapies was estimated at \$54.4 billion in 2010.

Source: Kalorama Information, The World Market for Cancer Therapeutics and Biotherapeutics, 4th Edition.

For more information, visit [kaloramainformation.com](http://kaloramainformation.com).

The overall market for small-molecule targeted cancer therapies generated revenue of \$20.3 billion in 2010 and is projected to reach \$27.3 billion worldwide in 2015.

Source: Visiongain, Small-Molecule Targeted Cancer Therapies: World Market 2011-2021.

For more information, visit [visiongain.com](http://visiongain.com).

**CENTRAL NERVOUS SYSTEM**

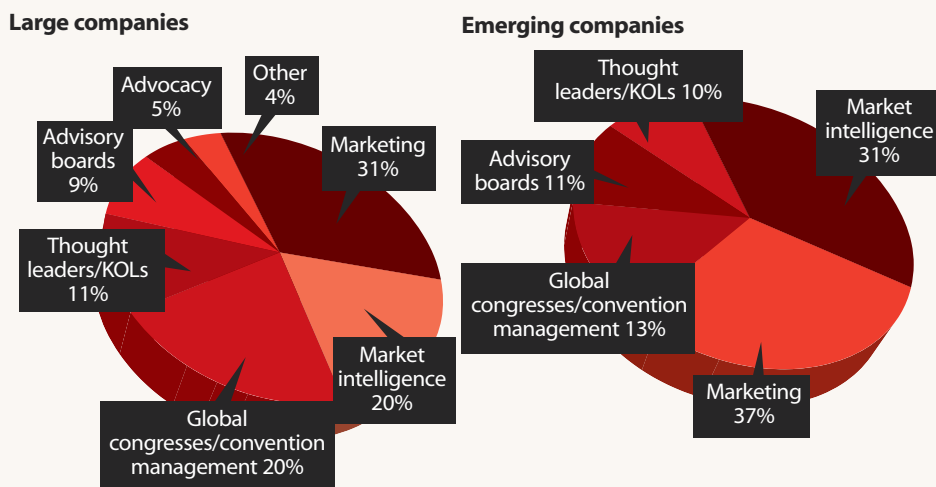
Despite the generic availability of five serotonin reuptake inhibitors (SSRIs), Forest Laboratories/Lundbeck's Lexapro remains commonly prescribed as a first-line treatment for generalized anxiety disorder (GAD) patients. According to analysis of patient-level claims data, patient share for Lexapro is only slightly less than the patient share of generic citalopram and sertraline.

Source: Decision Resources, Treatment Algorithms in Generalized Anxiety Disorder.

For more information, visit [decisionresources.com](http://decisionresources.com).

The majority of recently treated Parkinson's disease patients maintain their use of key therapies even as their drug regimens are subject to adjustments. Analysis of U.S. patient claims data finds that 82% of use of Teva Pharmaceuticals' monoamine oxidase type B (MAO-B) inhibitor Azilect among recently treated patients was from continuing business, defined as a patient maintaining treatment with a key

**PERCENTAGE OF GLOBAL STRATEGIC MARKETING INVESTMENT**



Source: Best Practices, Oncology Global Strategic Marketing: Benchmarking Budget Levels and Service Scope. For more information, visit [best-in-class.com](http://best-in-class.com).

**Global Strategic Marketing Key TO SUCCESS IN ONCOLOGY LAUNCHES**

Managing all the aspects of successfully launching a new oncology product is a daunting endeavor that often falls to the company's global strategic marketing (GSM) function.

According to the Best Practices benchmark study, Oncology Global Strategic Marketing: Benchmarking Budget Levels and Service Scope, the regulatory environment, regional differences, and the competitive nature of the oncology marketplace present significant challenges for GSM organizations, and the evolving nature of these challenges pushes GSM organizations to continually assess their budgets, investment strategies, staffing, structure, and scope of services.

therapy the last three months of the analysis.

Source: Decision Resources, Treatment Algorithms in Parkinson's Disease.

▼ For more information, visit [decisionresources.com](http://decisionresources.com).

The global depression therapeutics market was valued at an estimated \$4.3 billion in 2010 and is expected to grow at a CAGR of 13.4% over the next eight years to reach \$8 billion by 2018. The depression therapeutics market will witness the patent expiry of Lexapro in 2012, Cymbalta in 2013, and Effexor XR in 2014. But the launch of new drugs offering better efficacy and safety profiles, along with disease modifying properties, will help to sustain steady and positive growth during the forecast period to 2018.

Source: GlobalData, Depression Therapeutics - Pipeline Assessment and Market Forecasts to 2018

▼ For more information, visit [globaldata.com](http://globaldata.com).

The market for Parkinson's disease drugs is anticipated to reach \$3.754 billion in 2015. New products, including adenosine receptor antagonists, will benefit the Parkinson's treatment market and stimulate growth of overall revenue in the next decade.

Source: Visiongain, Parkinson's Disease: World Drug Market 2011-2021.

▼ For more information, visit [visiongain.com](http://visiongain.com).

## DIABETES

A rapidly changing and highly competitive diabetes marketplace demands that pharma and biotech companies be vigilant and ready to adapt new technologies and new therapeutic approaches when launching a new product. To ensure successful market entry, diabetes launch teams are scrutinizing their strategies and tactics

to support early market education, which has become a critical launch factor. Diabetes launch teams introduce education to primary care physicians and nurse practitioners somewhat earlier — at two years prior to actually launch — than companies generally do for drugs competing in other therapeutic areas.

Source: Best Practices, Shaping the Marketplace to Support Successful Diabetes Product Launches: Tactics for Educating KOLs, Physicians, Patients and Payers.

▼ For more information, visit [best-in-class.com](http://best-in-class.com).

Russia's type 2 diabetes drug market is projected to grow more than 7% annually from \$1.2 billion in 2010 to \$1.7 billion in 2015 and will be driven by the introduction of several premium-priced agents and the increasing use of glucagon-like peptide 1 (GLP-1) analogues, dipeptidyl peptidase (DPP-IV) inhibitors, and insulin analogue mixes.

Source: Decision Resources, Emerging Markets report, Type 2 Diabetes in Russia.

▼ For more information, visit [decisionresources.com](http://decisionresources.com).

The global market for diabetes management accounted for \$41.9 billion in 2010 and is expected to attain a market size of \$114.3 billion in 2016 for a CAGR of 18.2%.

Source: Transparency Market Research, Global Diabetes Market: Drugs & Devices (2011 - 2016).

▼ For more information, visit [transparencymarketresearch.com](http://transparencymarketresearch.com).

## GASTROINTESTINAL

For the next eight years, the global market for gastroesophageal reflux disease (GERD) therapeutics is

expected to decline by a 2% CAGR, dropping from a 2010 valuation of \$5.8 billion to \$4.9 billion in 2018. The GERD market will be heavily impacted by patent expirations over that period.

Source: GlobalData, Gastroesophageal Reflux Disease (GERD) Therapeutics - Pipeline Assessment and Market Forecasts to 2018.

▼ For more information, visit [globaldata.com](http://globaldata.com).

## INFECTIOUS DISEASE

The global market for healthcare-acquired infection treatments, valued at an estimated \$16 billion in 2010, is projected to grow to \$19 billion in 2011 and to exceed \$30 billion by 2016, for a CAGR of 9.5% for the five-year period.

Source: BCC Research, Healthcare-Acquired Infection: Devices, Pharmaceuticals, and Environmental Products.

▼ For more information, visit [bccresearch.com](http://bccresearch.com).

Three months after the launch of Vertex's Incivek (telaprevir) and Merck/Roche's Victrelis (boceprevir), there is strong interest and high demand for triple therapy with the new protease inhibitors. More than two-thirds of surveyed physicians have initiated trials with Incivek or Victrelis compared with more than one-half of physicians at one month post-launch. Most physicians report that they have prescribed both brands.

Source: BioTrends Research Group, LaunchTrends: Incivek and Victrelis, Wave 2.

▼ For more information, visit [bio-trends.com](http://bio-trends.com).

The global influenza vaccines market was valued at \$3.53 billion in 2011 and is forecast to grow at a CAGR of 5.8% over the next seven years, to reach about \$5.24 billion in 2018. Growth of the market is because of the increasing awareness among people about the importance of vaccination against influenza, as well as the approval of new influenza vaccines.

Source: GlobalData, Influenza Vaccines Therapeutics — Pipeline Assessment and Market Forecasts to 2018.

▼ For more information, visit [globaldata.com](http://globaldata.com).

A survey of 12 large pharmaceutical companies found a majority expected to increase spending for four of six GSM activities for pipeline products over the next two years. Activities expected to gain include ad boards, marketing, thought leaders, and market intelligence.

▼ For more information, visit [best-in-class.com](http://best-in-class.com).

## Other market insights...

### China Forecast to Become THIRD-LARGEST PHARMACEUTICAL MARKET BY 2013

While the United States and Europe still dominate

the contract research organization (CRO) market and account for the majority of clinical research activities, this trend is changing with the emergence of regions such as China, which provides access to a large patient population, good infrastructural facilities, and a large pool of healthcare professionals.

The GBI Research report, Emerging Pharmaceutical Market in China — Forecast to Become The World's Third-Largest Pharmaceutical Market By 2013, projects China will have the fastest-growing pharmaceutical market in the world, posting a CAGR of 12.5% for the period of 2009 to 2014.

▼ For more information, visit [gbiresearch.com](http://gbiresearch.com).

### Monoclonal Antibodies CONTINUE RAPID GROWTH

Monoclonal antibodies (mAbs) remain one of the most valuable and rapidly growing segments of the worldwide pharmaceutical industry.

According to the Deloitte Recap report, What's the Deal with Monoclonal Antibodies? How Technology, Therapeutic Area, and Stage at Signing Can Affect Deal Value, in 2010, the top 10 selling mAbs generated more than \$41 billion in worldwide sales.

MABs have dominated targeted cancer drug sales growth in the last five years because of their unique ability to bind to specific antigens within human cells, tissues, and organs.

Deloitte Recap data show that biopharmaceutical companies actively sought access to mAb platform and enabling technologies focused on cancer and paid a premium for later-stage mAb products.

▼ For more information, visit [recap.com](http://recap.com).

## Devices and Diagnostics Market EXPERIENCING PRESSURE

According to the Life Science Intelligence report, Opportunities in Global Medical Devices & Diagnostics, the global medical devices and diagnostics (MD&D) market rebounded more than expected in 2010 to generate \$327 billion in revenue following flat sales in 2009 due in part to the global economic downturn.

Much of the rebound reflected growth in middle-income and developing nations, although the adoption of new technologies in developed nations also contributed.

But, the report says, continued downward pricing pressures globally, coupled with uncertainty regarding the direction of healthcare in the

United States, will offset many of the gains accruing from demographics and the growing prevalence of age-related diseases, especially obesity and diabetes.

▼ For more information, visit [lifescienceintelligence.com](http://lifescienceintelligence.com).

## Latin America Expected to Post SLOWER GROWTH OVER NEXT FEW YEARS

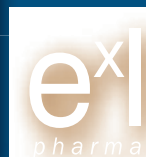
The Latin America region is better prepared to face global instability than in the past, but economic growth is expected to slow down after a recent period of remarkable growth. The Espicom Healthcare Intelligence report, The Outlook for Medical Devices in Latin America, proj-

ects that the eight Latin American medical markets are expected to grow by a CAGR of 4.6% between 2008 and 2013, reaching \$9.2 billion.

Levels of service in the buoyant private health sector are among the best to be found, but the challenge is to provide better levels of basic healthcare to the majority of the population. According to the report, Brazil is the largest medical market, followed by Mexico, Argentina, and Colombia.

Cuba, however, has the highest level of medical spending per capita in the region, but this is mostly for the purposes of so-called health tourism, not the benefit of the local population.

▼ For more information, visit [espicom.com](http://espicom.com). PV



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