

U.S. Pharmaceuticals

UBS Large Cap Pharmaceuticals Monthly Handbook

What's new? November TRx data

This publication consists of monthly therapeutic market models, TRx growth trends, market share & sales estimates, and monthly promotion detail tables for key products within large cap pharmaceuticals.

In diabetes, the DPP-IV class grew 8.5% Y/Y in November

In diabetes, one of the key debates has been whether the SGLT-2 class will materially hurt the DPP-IV class after the readout of positive results from the EMPA-REG outcome study. Since the release in August, the share for the DPP-IV class has remained stable at 11.9%, and the Y/Y growth of 8.5% in November was notable. With that said, it looks like the market share for the SGLT-2 class could be improving, as in November, the SGLT-2 class gained 10 bps, up to 5.0% share from 4.9% in October, and Jardiance had a significant share gain (up 60 bps M/M) within the class at the expense of Farxiga and Invokana.

The Alzheimer's, osteoporosis, ED markets have been declining

The Alzheimer's, osteoporosis, and the erectile dysfunction markets continued to decline, with Alzheimer's down ~3% (-6% YTD), osteoporosis down ~2% (-6% YTD), and ED down -6% (-7% YTD).

Figure 1: DPP-IV and SGLT-2 Market Share in Diabetes Market

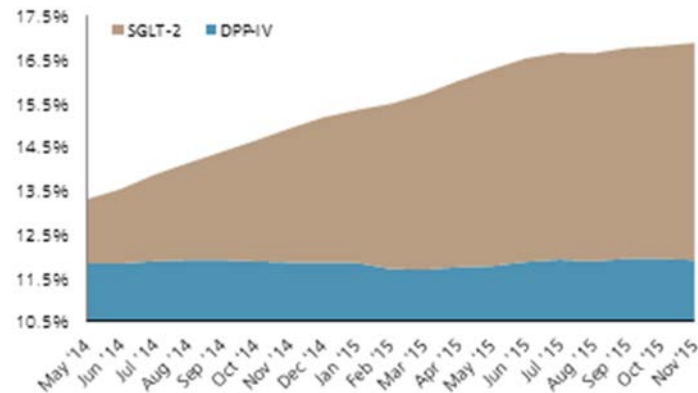
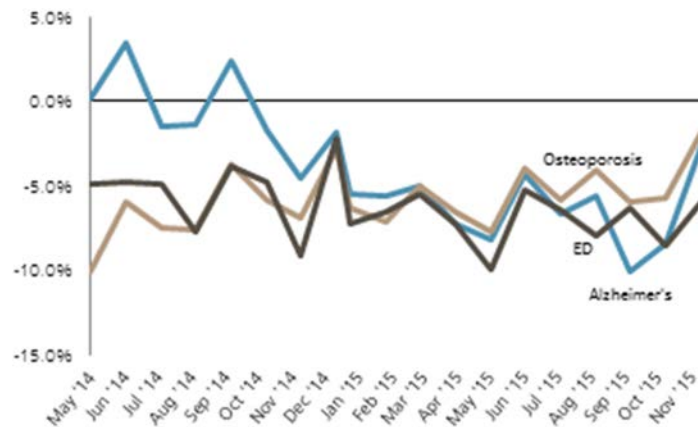


Figure 2: Market Growth for Alzheimer's, Osteo, and ED



Source: IMS Health

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