

Dymista

Competitor

patent infringement

New  
**DYMISTA**<sup>TM</sup>

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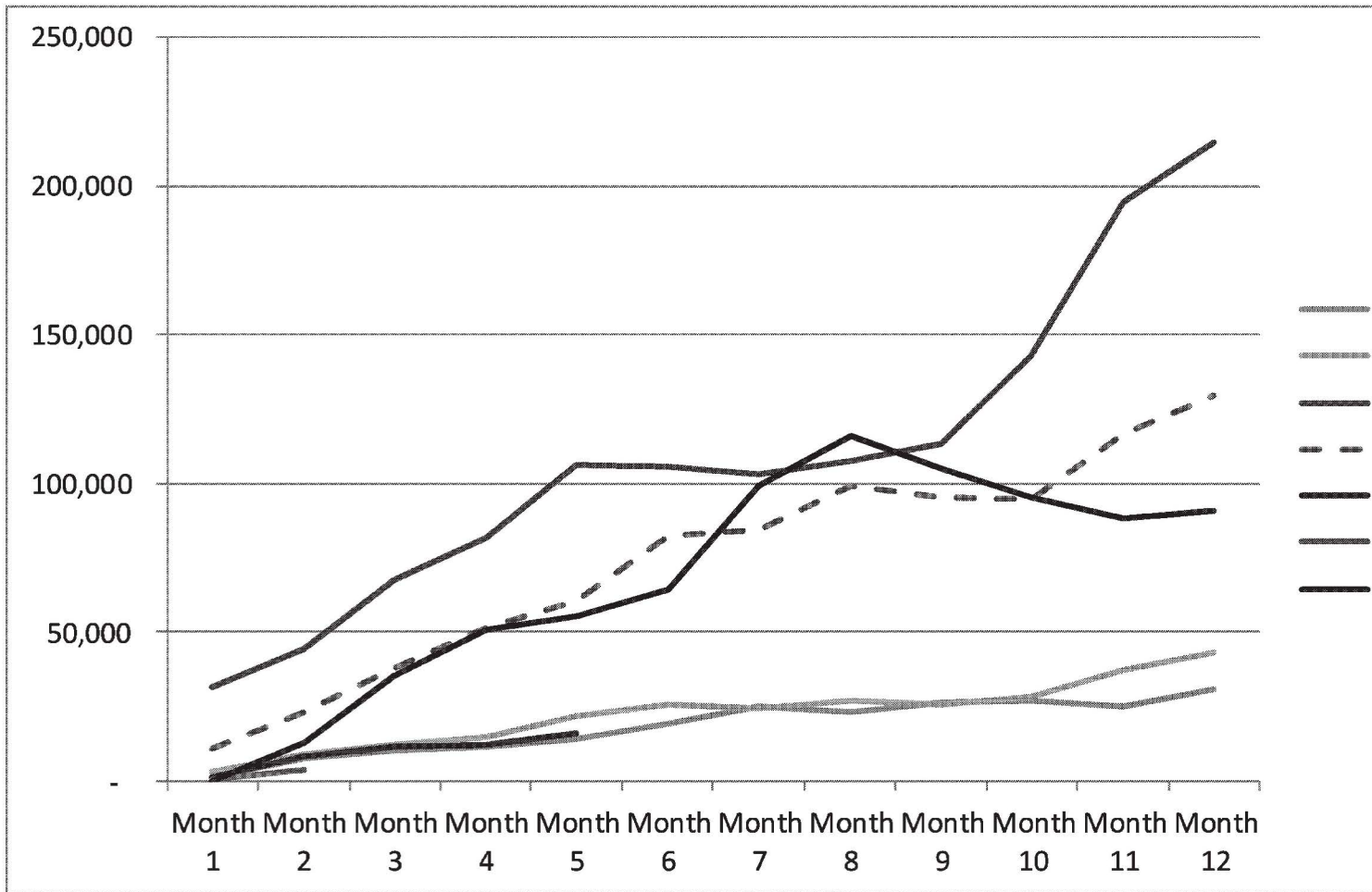
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SUBJECT TO STIPULATED PROTECTIVE ORDER

## Dymista Uptake Is Expected To Outpace R Competitive Launches

- The prescription nasal spray market is established, yet BIG opportunities s
  - 60MM TRxs (\$3.5 BUSD) and +3.5%-5% growth per year
  - There has been limited innovation in recent years
- Patent protected products are fighting for share in a declining branded se
  - 2008 →60% Brand/ 40% Generic
  - 2012 →30% Brand/ 70% Generic
- Product differentiation and support drive uptake
  - Veramyst launched in 2007 into a branded market with a new device, access, and 1700 sales reps completely focused on asthma/ allergy pr
  - Omnaris launched almost one year later with limited differentiation, access, and a sales force of 1950 reps not fully focused on allergy pre reps carried Lunesta and visited psych/sleep physicians in addition to
- Established brands are continuing to invest in segments beyond HCPs –(N continuing to invest in DTC/ consumer

# Differentiation and Strong Support Drive Uptake

TRx



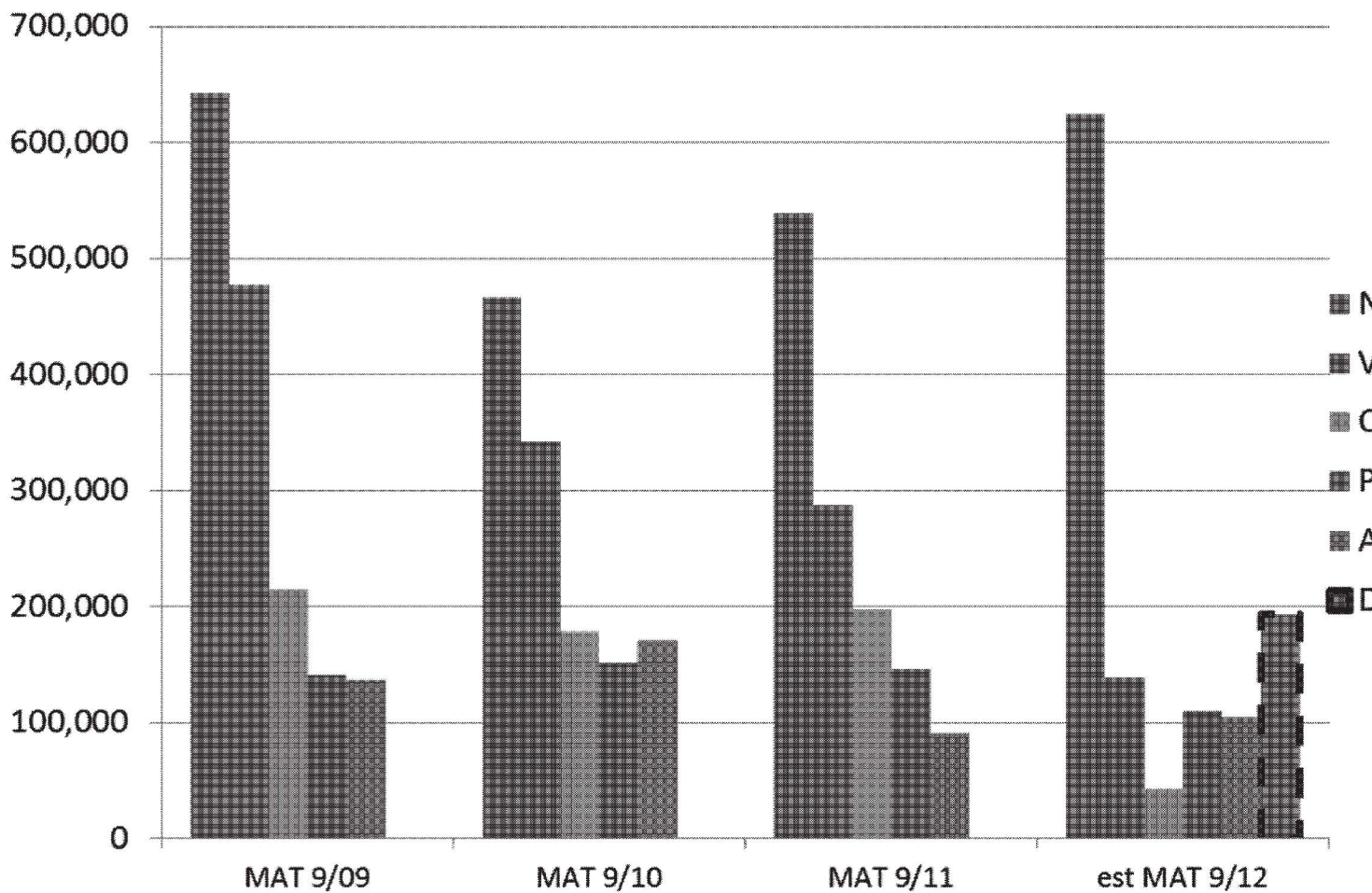
Note: Veramyst success is due to the number reps and favorable access; At launch Veramyst delivered 3.5X the number details the brand is currently delivering

DRAFT – Not For Distribution

3 Source: WK Data TRx

# Competitor Benchmarking: Key Uptake Driver Veramyst Launched With Strong Sales Force Support However Support Decreased Over The Years

## Sales Calls



\*detail levels for MAT 9/08 assumed similar to MAT 9/09

Source: IMS IPS

## Competitor Benchmarks: Estimated Sales Force Size

Year	Product	# of Reps	# of
4Q2012	Nasonex	1,000 reps	
	Veramyst	350 reps*	
	Omnaris	360 reps	
	Dymista	200 reps	
	QNASL <sup>^</sup>	185 reps	
	Zetonna <sup>^</sup>	110 reps	

At launch:

- Veramyst was supported by 1700 reps focused on asthma and allergy (the two lead products the reps carried were Advair and Veramyst)
- Omnaris was supported 1950 reps however targeting was not fully for allergy prescribers (reps carried Lunesta and Omnaris)

\*Veramyst value reflects respiratory sales force only; Veramyst is also currently carried by 2 CNS sales forces with the impact of these sales forces is unknown and is unlikely to have significant impact

<sup>^</sup>QNASL and Zetonna are estimated based upon current sales force size and products carried – actual data will be available later

Source: Pharmaforce data; ZS Associates

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