



Commercial and Stakeholder Perspectives: Allergic Rhinitis

Is there life after Claritin?

AC Classes: R6A0, R1A1, R1A4, R1A6, R1A7, R1B0.

Countries: US, Japan, France, Germany, Italy, Spain and UK

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www.datamonitor.com

Datamonitor USA
245 Fifth Ave
4th Floor
New York, NY 10016
USA

t: +1 212 686 7400
f: +1 212 686 2626
e: usinfo@datamonitor.com

Datamonitor Europe
Charles House
108-110 Finchley Road
London NW3 5JJ
United Kingdom

t: +44 20 7675 7000
f: +44 20 7675 7500
e: eurinfo@datamonitor.com

Datamonitor Germany
Messe Turm
Box 23
60308 Frankfurt
Deutschland

t: +49 69 9754 4517
f: +49 69 9754 4900
e: deinfo@datamonitor.com

Datamonitor Asia Pacific
Room 2413-18, 24/F
Shui On Centre
6-8 Harbour Road
Hong Kong

t: +852 2520 1177
f: +852 2520 1165
e: hkinfo@datamonitor.com

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ABOUT DATAMONITOR HEALTHCARE

Datamonitor Healthcare provides a total business solution to the pharmaceutical and healthcare industries. Its services reflect its expertise in therapeutic, strategic and eHealth market analysis and competitive intelligence. For more details of Datamonitor Healthcare's syndicated and customized products and services, please refer to the Appendix or contact:

Anne Delaney, Director of Research and Analysis, +44 (0)20 7675 7221, adelaney@datamonitor.com

About the immune disorders and inflammation pharmaceutical analysis team

Datamonitor's therapeutic area studies comprise the following features:

- clinical opinion leader intelligence and best-in-class case studies, leading to actionable recommendations;
- R&D pipeline and unmet need analysis;
- analysis of current physician attitudes and perception;
- scenario-based revenue and epidemiology forecasting;
- supporting presentations and spreadsheets of data and key conclusions.

The IDI team is headed by Simon Wright, he holds an MBA from London Business School, and a BSc (Hons) Biological Chemistry and can be contacted on +44 (0)20 7675 7844 or swright@datamonitor.com.

CHAPTER 1 EXECUTIVE SUMMARY

Objective of the analysis

The objective of this analysis of the allergic rhinitis market is to enable the reader to:

- quantify future size and scope of market and potential for new products;
- benchmark pipeline against currently marketed products;
- formulate launch strategies;
- quantify the impact of key patent expiries;
- develop commercial strategies across the seven major markets.

Scope and focus

Commercial and Stakeholder Perspectives Allergic Rhinitis explores trends and developments within patent expiry and over-the-counter status vs. prescription-only availability. Qualitative opinion leader research and qualitative IMS data are used to analyze current therapeutic dynamics and forecast future sales. Issues analyzed include:

- the impact of patent expiry and changes in government regulation and attitude to generics are explained;
- the effect of prescription (Rx) to over-the-counter (OTC) drug switches as a strategic move or by governmental pressure and the reaction of the US insurance market;
- sales forecasts for leading brand drugs, based on historical data and event analysis.

Analysis in this report is based on sales and promotional data provided by IMS Health. Datamonitor also interviewed physicians, specialists, in the US, Europe and Japan about their experiences and opinions on the allergic rhinitis market.

The following opinion leaders were interviewed by Datamonitor during the course of this report:

- Professor Bruce Bochner, Professor of Medicine, Johns Hopkins Asthma and Allergy Center, Baltimore, US;
- Dr Michiko Haida, Head of the Division of Allergy and Respiratory Diseases, Department of Internal Medicine, Hanzomon Hospital, Tokyo, Japan;
- Dr Eckard Hamelmann, Head of the Respiratory Infections and Asthma work-group, Charité-Virchow Hospital, Berlin, Germany;
- Professor William Reed Henderson, Jr, Professor of Medicine, Head, Allergy Section, University of Washington, US;
- Professor Anthony Barrington (Barry) Kay, Professor and Director, Department of Allergy and Clinical Immunology, Imperial College School of Medicine, UK.

Datamonitor insight into the allergic rhinitis market

In the course of its research and analysis for *Commercial and Stakeholder Perspectives: Allergic Rhinitis*, Datamonitor identified the following three key conclusions:

- *in 2003, 91% of the total promotional spend in the US and the five EU countries was spent on detailing physicians. Accurately targeting the appropriate physicians is critical to effective detailing. The physician specialists prescribing treatments for allergic rhinitis are numerous and wide ranging in the US, Germany and Japan. However, the other EU countries are heavily skewed towards PCP treatment of allergic rhinitis;*
- *the impact of patent expiry on Claritin (loratadine) has seen wide-ranging country variances, in terms of both revenue and prescription volume sales adjustments for the brand, molecule and class. Germany, the US and the UK experienced the largest reduction in brand revenue sales values, whereas generic erosion was minimal in Japan and the remaining EU countries;*
- *careful consideration of the impact of patent expiry on Claritin, provides several points as to how other antihistamines may be impacted by similar events. The 2007 Zyrtec (cetirizine) patent expiry, and a favorable outcome for the generics companies in the Allegra (fexofenadine) patent legislation, are two such events.*

The basis for these conclusions, along with supporting data is provided in the accompanying PowerPoint presentation. Forecasts for the seven major markets are provided in the accompanying Excel file.

This report is produced in three parts:

1. Word document: contains key conclusions and a summary of the current market and future opportunities and threats. Outlines the assumptions and events utilized in forecasting the market. Assesses strategic case studies to provide insight into potential market strategies;
2. Excel document: contains forecasts on a country-by-country basis for the seven major markets. Country, region and class/brand charts can be generated in this file for both volume and value units;
3. PowerPoint executive presentation: shares Datamonitor's key insight into the market with supporting data and recommendations.

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