Growth of the Vulvar Vaginal Atrophy (VVA) Therapy Market

Sheryl A Kingsberg, PhD¹; Sharon J Parish, MD²; Jaime Ferrer³; Shelli Graham, PhD³; Brian Bernick, MD³; Sebastian Mirkin, MD³

¹University Hospitals Cleveland Medical Center, MacDonald Women’s Hospital and Case Western Reserve University School of Medicine, Cleveland, OH; ²Weill Cornell Medical College, New York, NY; ³TherapeuticsMD, Boca Raton, FL
Disclosures

- **Advisory board/Consultant/Investigator**: AMAG, Dare, Duchesnay, Emotional Brain, Endoceutics, GTx, IVIX, Lupin, Materna, Palatin Technologies, Pfizer, Sermonix, Strategic Scientific Solutions, TherapeuticsMD, and Valeant
Background

- Up to ~70% of postmenopausal women, representing an estimated 45 million women in the United States, have VVA symptoms\textsuperscript{1-3}

- Surveys published in 2013\textsuperscript{4} and 2017\textsuperscript{2} found that only 7% of women with VVA symptoms currently use prescription therapy, indicating a significant unmet need
  - Newer products approved over the past few years have expanded the treatment armamentarium

- NAMS, ISSWSH, and other medical societies focused on women’s health have also developed several initiatives to increase awareness of VVA and GSM

- Newer product approvals that include innovation and awareness initiatives may have impacted the size of the VVA treatment market


Objective

• To analyze growth of the market for VVA treatment using a large prescription database
Methods

• Data from 2012 to July 2019 were analyzed from
  • Pharmaceutical Audit Suite (PHAST™) monthly prescription data published by Symphony Health
  • Prescription data from IQVIA and TherapeuticsMD affordability program
  • Patient counts obtained from the Total Patient Tracker published by IQVIA
Phast Prescription Data

- From 2017 to 2018, new prescriptions increased by 9.0% and total prescriptions increased by 7.2%
Patient Number Data

- From 2017 to 2018, patient numbers derived from prescription counts increased by 8.2%
Market Share – Older Products

- Market share of Estrace has increased over the last few years, while the market shares of Premarin and Vagifem have decreased.

**New Prescriptions**

- Estrace B&G: 43%
- Estrage: 24%
- Premarin: 19%
- Vagifem B&G: 4%

**Total Prescriptions**

- Estrace B&G: 35%
- Estrage: 26%
- Premarin: 20%
- Vagifem B&G: 4%
Market Share – Newer Products

- Market share for Imvexxy, introduced mid-2018, has increased, while Osphena market share has been dropping in the last few years.
Brand vs Generic Products

- Introduction of less expensive generic vaginal creams increased the vaginal cream market, but generic vaginal tablets did not influence the vaginal tablet market.

*2019 (1-year) estimated using 7 months of data.
Conclusions

• An overall increase of about 9% was observed in the market for VVA treatment in 2018
• This growth may be a result of education and awareness about VVA and GSM and the introduction of less expensive products or newer innovative products
• Continued market growth is important for the millions of menopausal women with VVA and GSM symptoms who remain untreated