Growth of the Vulvar Vaginal Atrophy (VVA) Therapy Market

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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[1-3]
- Surveys published in 2013[4] and 2017[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

GSM: genitourinary syndrome of menopause; ISSWSH: International Society for the Study of Women's Sexual Health; NAMS: North American Menopause Society; VVA: vulvar and vaginal atrophy.

1. Gass ML, et al. *Menopause*. 2011;18:1160-1171. **2.** Kingsberg S, et al. *J Sex Med*. 2017;14:413-424. **3.** Age and sex composition in the United States: 2018. Available at www.census.gov/data/tables/2018/demo/age-and-sex/2018-age-sex-composition.html. Accessed on 11Sep2019. **4.** Kingsberg SA, et al. *J Sex Med*. 2013;10:1790-1799.

Objective

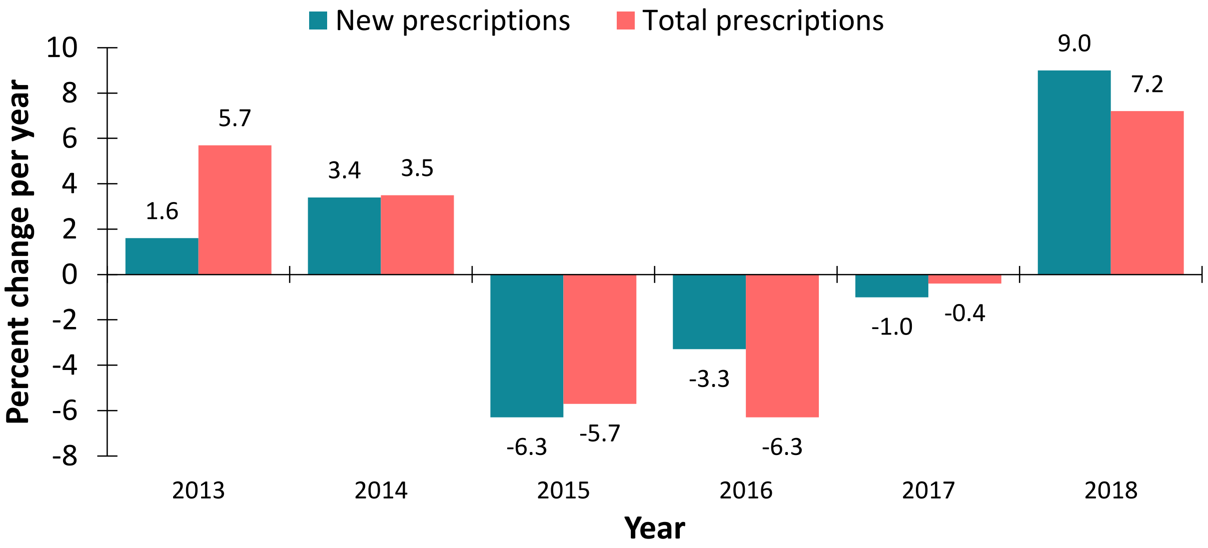
- To analyze growth of the market for VVA treatment using a large prescription database

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

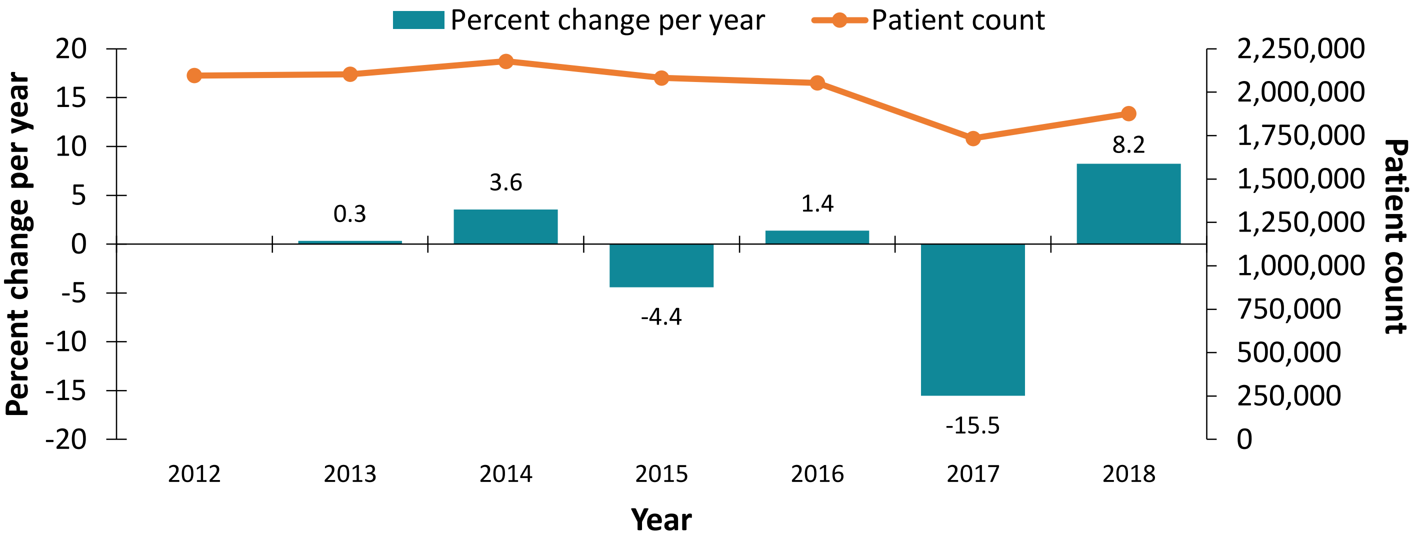
Phast Prescription Data

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



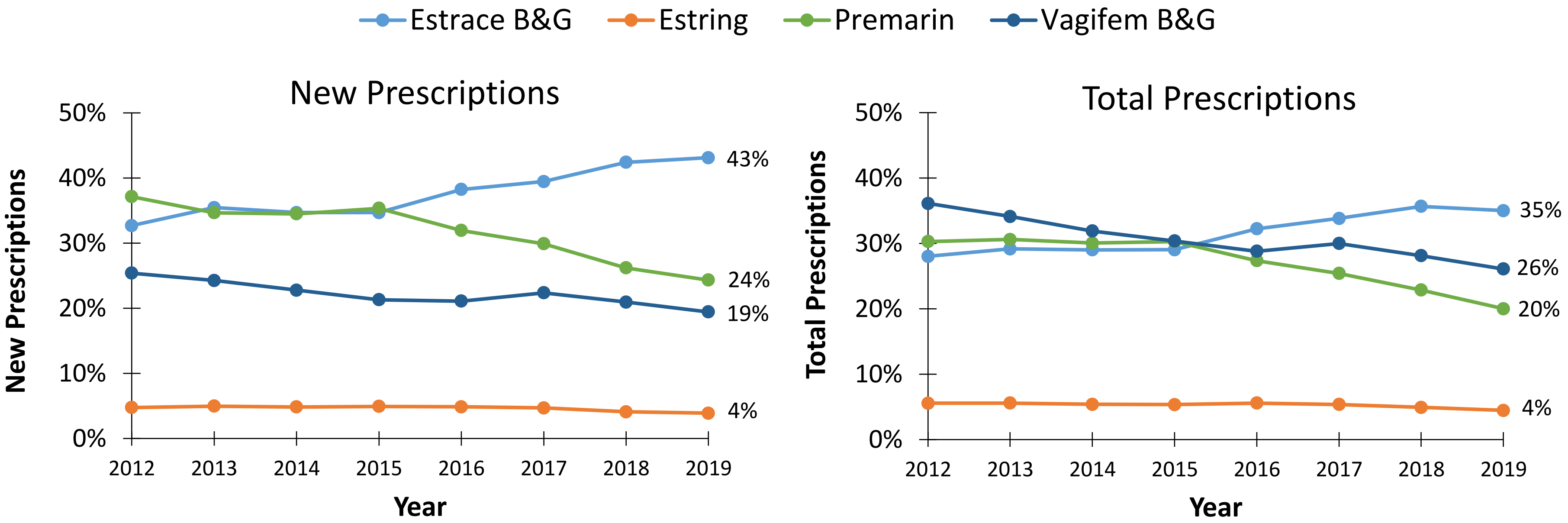
Patient Number Data

- From 2017 to 2018, patient numbers derived from prescription counts increased by 8.2%



Market Share – Older Products

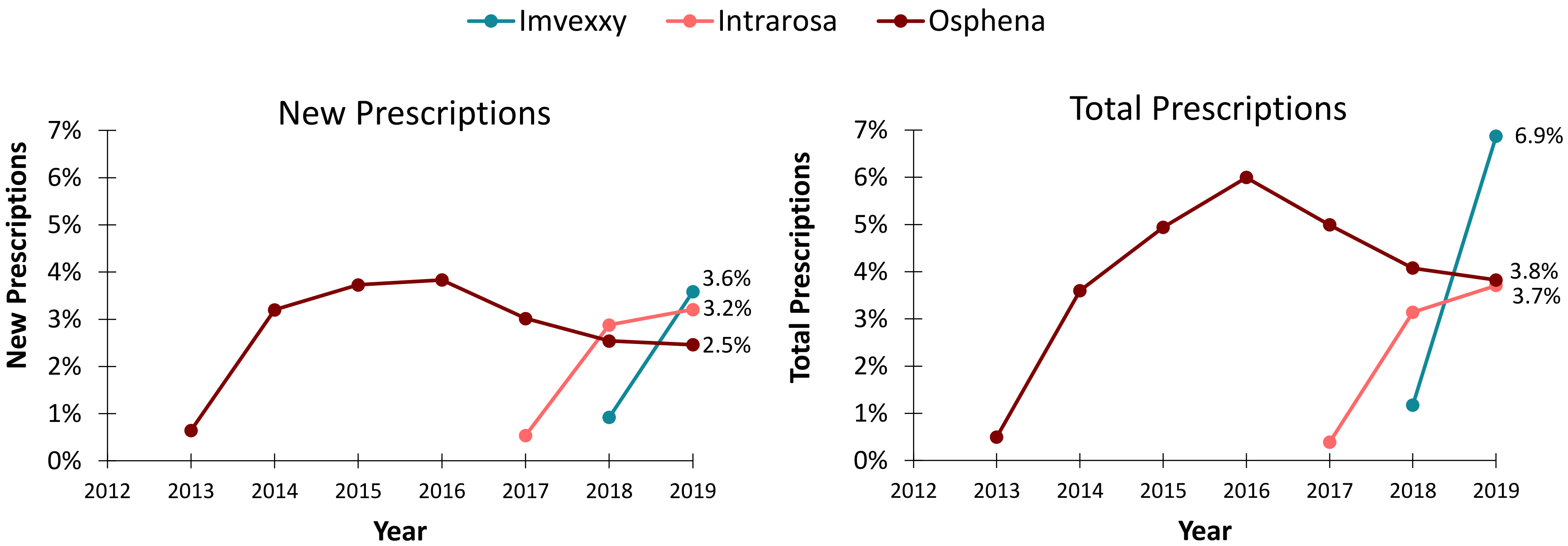
- Market share of Estrace has increased over the last few years, while the market shares of Premarin and Vagifem have decreased



B&G: brand & generic products.

Market Share – Newer Products

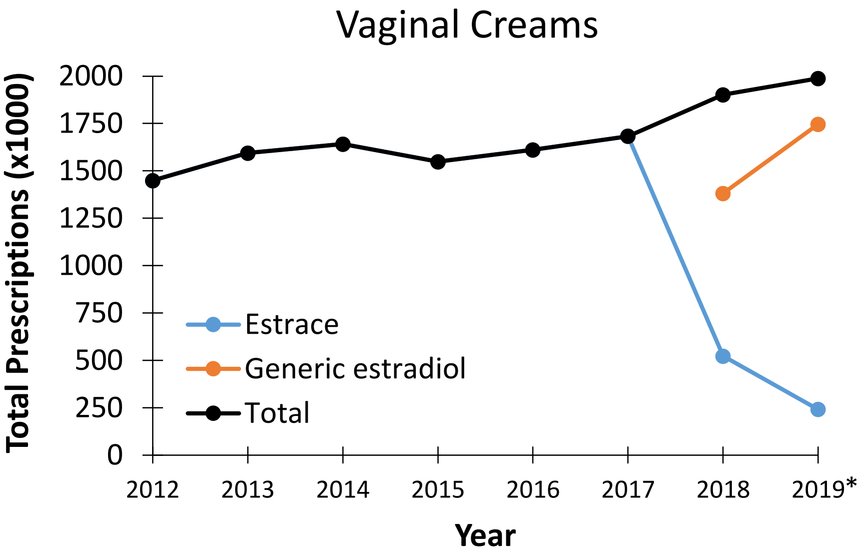
- Market share for Imvexxy, introduced mid-2018, has increased, while Osphena market share has been dropping in the last few years

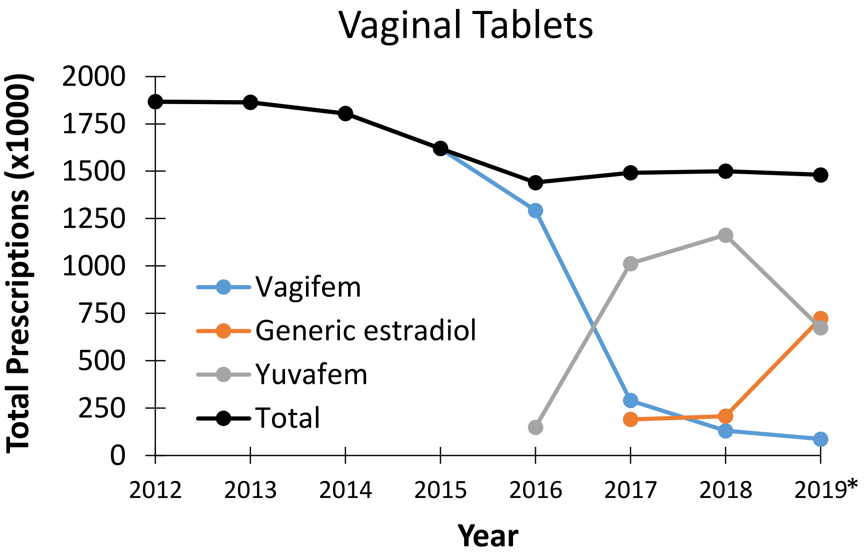


B&G: brand & generic products.

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