

Emerging Markets

The Ultimate Analysis of New and Growing Pharmaceutical Markets

Decision Resources is the FIRST and ONLY company to offer a syndicated report series for high-growth emerging markets with comprehensive disease-specific analysis.

Did you know?

- India's breast cancer drug market will almost double by 2012
- Diagnosis and drug treatment of Alzheimer's disease in China is low and will remain low through 2012
- China's hepatitis C virus drug market will grow to \$150 million by 2012
- Prevalence of type 2 diabetes in India is approaching that of Western markets and growing at a faster rate
- China's major depression drug market will triple by 2012
- India's hepatitis C virus drug market will grow to more than \$171 million by 2012
- China's renal cell carcinoma drug market will grow more than five-fold by 2012

Key Users

- Global Market Research
- Global Government Affairs
- New Product Planning
- Commercial Analysis
- Epidemiology

With these reports, clients are able to:

- More accurately assess commercial opportunity for Western brands in emerging markets
- Understand the physician treatment patterns and drivers of choice in key urban areas based on primary research
- Gain a clear perspective from a 5-year, drug-level market forecast, which is broken out by multinational companies' sales versus their national competitors

Each report assesses the commercial opportunity in the pharmaceutical market for a disease based on population demographics, economic development, disease epidemiology and changing physicians' practices.

Key elements of each report include:

- Accurate sizing of and projections for the diagnosed and treated patient populations at national and city-specific levels
- Projections for future patient populations with access to Western medicine based on trends in lifestyle, urbanization and economic status
- Current treatment patterns and drivers of choice from physicians in key urban areas
- Physician-defined unmet needs in diagnosing and treating the disease
- Disease-specific pricing and reimbursement environment
- Key drivers of overall market growth and analysis of dynamics unique to the individual major city markets



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Primary Research Methodology

Our primary research with physicians, healthcare officials and other experts for each disease is informed by secondary sources that detail the new market's healthcare system, pharmaceutical sales and treatment guidelines. The primary research includes two phases: qualitative interviews and quantitative surveys.

Qualitative Interviews

We conduct 6 – 10 in-depth qualitative interviews in native language with leading physicians who are typically heads of their departments and/or leaders in their medical society. We also interview healthcare officials and hospital administrators to inform our understanding of the treatment of each disease. Topics we explore with these physicians and other experts include:

- Patient access to healthcare and insurance
- Patient access and willingness to buy Western branded pharmaceuticals
- Patient presentation behavior
- Screening and diagnostic practices
- Vaccine use (if applicable)
- Treatment choice and drivers of choice
- Leading influential factors and anticipated changes in medical practice
- Role of traditional or alternative medicines
- Unmet needs and challenges in treating each disease

Physicians are recruited from leading hospitals and medical centers.

Quantitative Surveys

The second phase of research is a survey of 90 – 110 physicians of the appropriate specialties, often conducted face-to-face in native language if cultural practice dictates. The survey is informed by the results of the qualitative interviews and includes both quantitative and qualitative questions. Topics we explore in these surveys include:

- Percent patient diagnosed, treated, and treated with Western medicine
- Percent patients screened, type of diagnostic practices
- Percent of patient population in various subgroups (e.g., severity, staging, viral status)
- Percent patients receiving specific drugs/other therapies
- Typical dosing for leading drugs
- Utilization of drugs by line of therapy
- Drivers of treatment choice and perception of leading therapies
- Ranking of unmet needs and challenges in treating the disease

Physicians are recruited from leading general and specialty hospitals and clinics in key urban centers, and regional differences are analyzed. We also conduct in-depth interviews with selected industry and academic experts with knowledge of various aspects of the healthcare system and pharmaceutical industry.

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