

GROWTH OF THE OSTEOARTHRITIS MARKET

KANTAR HEALTH DISCUSSES THE INCREASING PREVALENCE OF OSTEOARTHRITIS, HOW IT WILL AFFECT THE CURRENT AND FUTURE MARKET, AND OPPORTUNITIES FOR PHARMA.

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Osteoarthritis (OA), also known as degenerative joint disease, is a form of arthritis that wears down the tissue at the end of the bone. This condition accounts for more disability among the global elderly population than any other disease. OA is a debilitating condition that is characterized by joint inflammation and loss of normal joint function. The prevalence of OA decreases dramatically in adults under 45 years of age and is virtually nonexistent in those under 21 years of age.

OA has several classifications, including radiographic osteoarthritis (ROA), severe radiographic osteoarthritis (severe ROA) and symptomatic osteoarthritis (SOA), which are characterized by varying levels of symptoms, severity and sites of OA. Some patients experience ROA and SOA concurrently, the presence of which increases as patients age.

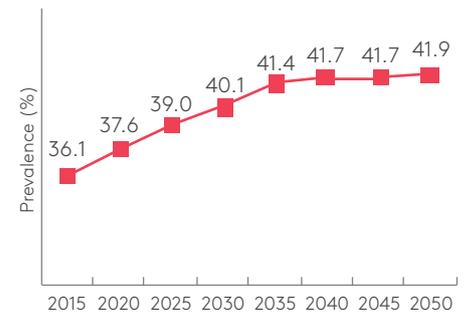
Recently, Kantar Health updated epidemiology and treatment data of OA in Epi Database® across the G7 population (U.S., France, Germany, Italy, Spain, the United Kingdom and Japan). Our experts weighed in to explain the current market, how OA affects patients, treatment of OA and how the future market may affect pharma.

WHAT IS THE CURRENT STATUS OF THE OA MARKET?

OA currently affects between 9.0% and 36.7% of the population, depending on type and site of the condition. Based on recent analysis, the prevalence of OA is expected to increase across the G7 populations. The prevalence of ROA and SOA of the knee, hip and hand is expected to increase by at least 2% by 2050, and in some cases by more than 5%. Hand ROA is expected to increase by the highest rate of all types of OA analyzed. In Spain alone, the prevalence of hand ROA is expected to increase by more than 13% by 2050. While prevalence rates are expected to increase across all G7 countries, the most

dramatic increases are expected to occur in Italy and in Spain.

EXPECTED GROWTH OF HAND ROA IN THE G7 COUNTRIES



Source: Epi Database, 2016

WHAT FACTORS ARE CONTRIBUTING TO THE GROWTH OF OA?

Aging significantly contributes to the growth of OA. Obesity has also been identified as a risk factor for OA because it reduces the skeletal-weight-to-body-mass ratio and applies compressive forces to joints. This can cause the malalignment of joints and reduces muscle strength, which leads to OA.¹ Research from our 2016 National Health and Wellness Survey (NHWS) shows that 78% of those diagnosed with OA in the United States are overweight or obese.² The high prevalence of obesity combined with the aging G7 populations indicates that the burden of OA will continue to increase in the coming decades.

THE GROWTH OF OA MAY NECESSITATE HIGHER USE OF HEALTHCARE RESOURCES AND THE DEMAND FOR NEW THERAPIES.

HOW DOES OA AFFECT PATIENTS' LIVES?

As previously mentioned, OA is the leading cause of disability in elderly adults. It is associated with decreased range of motion, pain and many other comorbidities. Based on results from NHWS, U.S. patients diagnosed with OA are more than twice as likely as those not diagnosed with the condition to experience high blood pressure and high cholesterol.²

OA patients report higher use of healthcare resources than those not diagnosed with OA, accounting for nearly 50% of all arthritis-related hospitalizations.³ Patients with OA also report higher rates of overall work productivity and activity impairment (WPAI). Our research indicates that patients with OA experience a lower physical quality of life, based on the SF36v2, compared with those not diagnosed with the condition.

HOW IS THE TREATMENT MARKET CHANGING AS A RESULT OF THE INCREASED PREVALENCE?

Currently, the only therapeutic options for OA include pain control and joint replacement; however, it's been suggested that the use of bisphosphonates, the active drug used to treat pain in OA, may also be used to reduce cartilage damage.⁴ The treatment market for OA is not robust with new developments because it's difficult to identify ways to evaluate the effectiveness of these therapies.⁵

In spite of limited treatment options, educating patients on their effectiveness may increase the demand for medications, as NHWS shows that symptoms improve significantly when patients take their prescribed medications. Fifty-two percent of OA patients reported mild symptoms when taking their medications compared with only 7% reporting mild symptoms when not taking their prescription.

In general, treatment satisfaction is low in the OA market, at 29% for prescription and 31% for over-the-counter medications. There is also a high level of switching medications, which presents an opportunity to reach not only newly diagnosed patients but also those who have been previously diagnosed.

HOW WILL THE INCREASED PREVALENCE OF OA AFFECT THE FUTURE MARKET?

The aging G7 populations and the high prevalence of obesity will continue to contribute to the growing prevalence of OA. The growth of this condition may necessitate higher use of healthcare resources and the demand for new therapies.

HOW WILL THE INCREASED PREVALENCE OF OA AFFECT THE PHARMA INDUSTRY?

The evidence that symptom experience improves with medication adherence coupled with the high rate of medication switching among OA patients indicates a demand for new therapies in the OA market. Pharma has the opportunity to educate patients on the symptom relief associated with OA medication adherence and develop new therapies to meet the demand of the growing OA patient population.

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