



Trends-in-Medicine

January 2002

By Lynne Peterson

SUMMARY

The contact lens company likely to see the most increase in business over the next six months is Johnson & Johnson/Vistakon, with Novartis/CibaVision mostly likely to lose market share. Bausch & Lomb is still struggling, with no improvement in sight. Among glaucoma medications, both Allergan's Lumigan and Alcon's Travatan are expected to continue to take market share from Pharmacia's Xalatan, with Travatan the apparent favorite. Pharmacia's Xalcom may be a good idea, but doctors are not convinced it will have significant advantages over Xalatan. Inspire's dry eye therapy, INS-365, failed in a Phase III trial.

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Trends in Medicine

Stephen Snyder, Publisher
1879 Avenida Dracaena
Jensen Beach, FL 34957

561-334-7409 Fax 561-334-0856

Eyecare Trends

To check on trends in the eyecare field, 56 optometrists and ophthalmologists as well as an industry expert were interviewed about contact lenses, glaucoma medications and dry eye therapies.

ALCON. The company has the highest-ranked pharmaceutical sales reps. The company's OptiFree Express is the leading contact lens solution among these sources and likely to retain that position, though it may lose some share over the next six months, in part, doctors said, due to supply problems. Contrary to national prescription share data, the company's glaucoma medication, Travatan (travoprost) is more popular with these doctors than Allergan's Lumigan (bimatoprost) to treat glaucoma. Doctors said this is due to Travatan's combination of efficacy and lower cost. A Florida doctor said, "Travatan has almost equal efficacy to Xalatan (Pharmacia, latanoprost), and it is cheaper." Another doctor said, "The Travatan bottle isn't clear, so patients don't complain about being 'cheated out of a full bottle.'" A third said, "The availability of Travatan samples is good; Xalatan samples are non-existent."

Patient Use of Glaucoma Medications

Medication	Usage
Beta blocker alone	33%
Pharmacia's Xalatan (latanoprost)	28%
Allergan's Alphagan (brimonidine tartrate)	18%
Alcon's Travatan (travopost)	12%
Allergan's Lumigan (bimatoprost)	7%
Novartis' Rescula (unoprostone)	1%
Other	2%

ALLERGAN. Allergan's Complete contact lens solution is beginning to catch on, but it remains a distant third, where it is likely to remain. Doctors praised Allergan's contact sales reps, but ranked them below Alcon's sales reps, and the company's pharmaceutical reps did not fare well.

Where Patients Buy Contact Lenses

Location	Purchasing
Optometrists	61%
Retail discount stores (Costco, Wal-mart, etc.)	17%
Telephone mail order	10%
Internet	6%
Other	6%

In the glaucoma market, Allergan's medication, Lumigan, is No. 3 among these doctors, and it is likely to remain in that position; there simply is more interest in Travatan than Lumigan. Numerous doctors also said hyperemia is a problem with Lumigan, usually a mild or moderate, not severe, problem. One said, "Hyperemia is a huge problem. Patients don't want to put up with the three weeks of redness." Another said, "There is too much redness that doesn't always dissipate!" A third commented, "Hyperemia is a very real and a big deal to patients, and doctors are unhappy with having to deal with the time and expense of the call-backs, regardless of the benign nature of hyperemia."

Glaucoma Medication Opinions

Question	Pharmacia's Xalatan	Allergan's Lumigan	Alcon's Travatan
Optometrist preference	40%	24%	36%
Patient preference	48%	22%	30%
Most efficacious	33%	42%	25%

Not all comments about Lumigan were negative. A doctor said, "I prefer Lumigan because of the ease of a 'single drop' dispensed from the bottle. That saves money, and less is wasted. But Lumigan, Travatan and Xalatan are all equal in efficacy." Another said, "Lumigan is lowering IOP with minimal side effects, but samples are limited compared to Travatan." A third commented, "I've started to use Lumigan, and it is lowering IOP 2-3 mm more than Xalatan, and it is working earlier."

Sources also criticized Allergan's marketing and problems obtaining Lumigan samples. A doctor said, "Lumigan is not on some formularies, and there has been poor servicing by the sales reps." Another commented, "There has been a lack of (physician) education by Allergan."

Allergan also has been trying, unsuccessfully, to get a dry eye medication on the market. In addition to the failure of INS-365 which Allergan had licensed from Inspire Pharmaceutical (see Inspire below), Allergan has been unsuccessful in getting its Restasis (cyclosporine A eyedrops) approved by the FDA. An ophthalmologist involved in dry eye research said, "My impression is that Restasis eventually will get approved with a more limited label for severe, complex dry eyes, but once it is on the market, doctors will ignore the label and use it more for run-of-the-mill dry eyes." Another source said, "Cyclosporine has been a little tricky to handle, and even in uveitis cases, it has largely remained in the domain of real uveitis specialists rather than general ophthalmologists or optometrists."

However, Allergan has an androgen eyedrop in development for dry eye that just started a Phase III trial, and ophthalmologists are somewhat more optimistic about the outlook for this. Dr. Darlene Dartt of the Schepens Eye Research Institute in Boston, said, "Androgen affects the meibomian gland and maybe the lacrimal gland, depending on

how it is given and if get to the lacrimal gland. This is very promising for lipid-deficiency dry eye; it goes after one of the basic deficiencies in this type of dry eye. There is no downside to it, really." Another source commented, "The androgen trial is really just getting started. There isn't much data on this yet." A third doctor said, "The new lubricant gels – for example, Alcon's Tears Naturale and Bion Tears, Allergan's Celluvisc and Cellufresh, and CibaVision's GenTeal – work well, and I like punctal plugs; they are easy, never hurt, are minimally invasive and are reversible. Some patients get dry eye as a side effect of medications, and when that happens, they won't get additional tear production even with androgens or other new medication. The only resolution is to wind up plugging the puncta."

BAUSCH & LOMB. Although doctors commented that B&L contact lens sales and pharmaceutical reps have improved slightly, they still found them among the worst in the industry. Contact lens sales for the next six months are predicted to remain relatively flat. B&L's contact lens solution, Renu, came in No. 2 among doctors interviewed, and the outlook is for Renu to lose some market share over the next six months, both to Alcon and to CibaVision, which is introducing its own no-rub solution. A doctor said, "I've been using mostly Renu, but I started switching patients to Complete with great success."

BIOCOMPATIBLES. The company announced recently that it is selling its eye care division to CooperVision. Few sources mentioned this company, and when they did comments were mixed. The outlook is for flat sales.

COOPERVISION. The sales reps are adequate, garnering few complements but also few complaints. Contact lens sales for the next six months are likely to remain relatively flat. One source said, "Cooper seems to be marketing new products more aggressively."

INSPIRE PHARMACEUTICALS. Doctors were surprised that a Phase III trial showed Inspire's dry eye (keratoconjunctivitis sicca) therapy INS-365 no better than placebo. The company is now analyzing the data to see if there are subgroups who responded. Even if INS-365 had proven effective, some sources were concerned that the product would have to be used too frequently to be well-accepted by patients. An expert said, "P2Y2 was likely to be only for severe dry eye patients -- Sjogren's patients – what we refer to as 'the wicked dead' disease folks."

Dry eye is a painful, burning and irritating condition involving abnormalities and deficiencies in the tear film due to a variety

of causes. P2Y2 agonists act on receptors on the surface of the eye and the inner lining of the eyelid to stimulate the release of water, salt, mucin and lipids – the key components of natural tears. The belief was that they would promote corneal healing and improve ocular surface health.

JOHNSON & JOHNSON/VISTAKON. Doctors overwhelmingly ranked the company's contact lens sales reps as the best in the field. A doctor said, "J&J supplies practitioners with ample trial lenses and delivers them to patients in a timely manner." Another said, "Vistakon has good sales reps, who drop by every six to seven weeks."

Acuvue lenses are far and away the most commonly prescribed contacts now, and that has not changed over the past year. Over the next six months, Vistakon sales are expected to increase for a third of doctors. In fact, Vistakon was cited by more than half the doctors as the company with the most momentum over the next six to 12 months, primarily because of its new tinted lenses.

MERCK. Among optometrists, Merck is almost a non-starter. Doctors complained that the sales reps rarely if ever visit them.

NOVARTIS/CIBA VISION. The company's contact lens sales reps used to be among the best in the business, but this time, they were ranked at the bottom of the list. The complaint is that the integration of CibaVision and WJ is not going well, but that is expected to improve over the next year, and some sources noted that Ciba is doing more advertising lately. Over the next six months, 24% of doctors said their use of CibaVision lenses would decline, but 26% also predicted Ciba would be the contact lens company with the most momentum over the next six to 12 months. Doctors praised the company for its wide range of lenses, new 30-day lenses and advertising. A source said, "Ciba has torics, colors, bifocals – everything, including custom lenses."

OCULAR SCIENCES. Sales reps for this niche player also got mixed reviews, and doctors predicted that Biomedics sales would decrease over the next six months.

PHARMACIA. The company's sales reps were strongly criticized. Doctors said they don't see reps often enough, and samples are hard to get.

Xalatan remains the most common prostaglandin prescribed to treat glaucoma, but it continues to lose market share to both

Lumigan and Travatan even though doctors said they are happy with Xalatan because patients are comfortable with it, it is on most formularies, and compliance is good. A doctor said, "Patients hate that the Xalatan drops 'pour out of the bottle,' and they see that it is 'half' full or less. In the future, I'll try Travatan because I want to see its results first-hand."

Pharmacia is working on Xalcom -- a fixed-dose combination of Xalatan and a beta blocker -- and most doctors considered this either a good or great idea. At the same time, doctors were equally split on the question of whether Xalcom has any significant advantages over Xalatan alone. Some sources believe Xalcom will be convenient and will improve patient compliance, but a few regard the combination as worthless, particularly if it doesn't lower intraocular pressure (IOP) at least 3 mm. Cost also is a big concern by many doctors. A source said, "Xalcom would be fantastic for patient compliance." Another said, "How would you decide when to give it? Patients take the beta blocker in the morning and the Xalatan at night." A third commented, "They work better when given separately." A fourth added, "It would be a good first-line drug to use." A fifth said, "Synergy should provide an opportunity for a lower target IOP." Still another doctor said, "For some patients, Xalcom may ensure IOP control, but for most it would offer no advantage." Another commented, "In theory, Xalcom would have better compliance, but it would have an advantage only if the cost is less than for the separate medications together."

REFRACTIVE SURGERY:

Ophthalmologists and optometrists all agreed that refractive surgery is off at least 30%, and none see a quick recovery. An ophthalmologist said, "The economy is part of it, the negative press about LASIK is another part, and the corporate mills are a big part – if nothing else, they confuse people. We were doing 250-300 procedures a month, and we wanted to go to 400-500 a month, and now we are at 200." ♦