



Trends-in-Medicine

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Quick Pulse

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GLAUCOMA UPDATE

Twelve ophthalmologists and optometrists were interviewed to check on trends in glaucoma drug usage and the outlook for new products. The conclusion: The marketing wars continue, but few market share shifts are expected.

Among these doctors, Pfizer's Xalatan (latanoprost) still accounts for more than half their prescriptions, and it is expected to lose very little market share over the next year. Alcon's Travatan (travapost) is likely to continue to beat Allergan's Lumigan (bimatoprost). A Florida optometrist said, "Lumigan has the most redness, and most doctors reserve it for cases where Xalatan and Travatan don't work as well...I've had a few patients where Lumigan was more effective than the other two...There is a real debate right now. Some people say they are all within 1%-2% of each other...but other doctors say that, for certain patients, one formulation works more effectively than another. The jury is still out...Xalatan is used the most because it is the least sensitizing and it has equal efficacy. Travatan has slightly better efficacy in African Americans, and Lumigan is used the least. Lumigan may be the most powerful, but it is also the most irritating."

Prostaglandin Use

Percent of glaucoma patients currently on a prostaglandin:	Lumigan	Travatan	Xalatan
Who are currently taking	12.5%	28.4%	59.1%
Who will be taking in six months	14.1%	28.8%	57.1%
Who will be taking in 12 months	14.1%	28.8%	57.1%

In addition to or in lieu of a prostaglandin, doctors often prescribe the beta blocker timolol and/or brimonidine to glaucoma patients. When prescribing brimonidine, doctors – and their patients – prefer Allergan's Alphagan P (brimonidine with purite as a preservative), to either Bausch & Lomb's generic brimonidine or brand brimonidine (Allergan's Alphagan). Alphagan P appears to be well differentiated from Alphagan (brand or generic).

However, the major difference in the prostaglandins is not IOP control but patient tolerability. An ophthalmologist said, "There is less allergy with Alphagan P." An optometrist said, "They use different preservatives, and they have different comfort levels." Another doctor said, "The preservative matters; there is reduced allergy with Alphagan P." A Florida doctor said, "Alphagan P is less likely to cause an allergic reaction than the original. I do believe that. If people are on glaucoma medications for a while, they are probably sensitized to it, and they will feel better with Alphagan P." An Indiana doctor said, "Tolerability and safety are superior with Alphagan P."

Among these sources, use of any of these agents has changed very little over the past six months. An optometrist said, "My usage is based on which is cheapest, free samples, Medicaid coverage, and programs for the indigent." Another doctor said, "Most people with glaucoma tend to be older and have more dry eye."

There is no question that cost is an issue, but, assuming the co-pay is not a whole lot different, then I choose Alphagan P. Because there is less allergy and better patient tolerability with Alphagan P, most doctors (9 of the 12) have not decreased their use of Alphagan P since the approval of generic Alphagan. Over the next year, Alphagan P is expected to maintain its market share and perhaps even gain slightly, while use of generic Alphagan is likely to go down a little.

Brimonidine Use

Percent of glaucoma patients:	Alphagan (brand or generic)	Alphagan P
Who are currently taking	2.7%	14.7%
Who will be taking in six months	2.2%	15.3%
Who will be taking in 12 months	1.7%	15.3%

THE MARKETING EFFORTS

Among the prostaglandin manufacturers, Alcon's sales force has the best reputation among these doctors. Allergan's sales reps came in second, and Pfizer/Pharmacia's reps were a distant third. Comments about specific companies include:

- **Allergan:** A doctor said, "The Allergan reps are good, but not as good as the Alcon reps."
- **Alcon:** A doctor said, "Allergan raised the bar, but currently Alcon has been the best."
- **Pfizer/Pharmacia:** A Florida doctor said, "Pfizer is actively seeing optometrists and providing samples, and it has a program for needy and indigent uninsured patients. Pfizer also started a program (ShareCard) for Medicare patients to get all Pfizer prescriptions for \$15 per prescription."

None of these companies has significantly changed its glaucoma marketing message or effort over the past few months, most sources agreed. However, an Indiana doctor said, "Alcon has attempted to come in as a price competitor." A Florida doctor said, "I see more ads in the journals, and there is more marketing to optometrists, but not sampling."

THE FUTURE

Over the next year or so, several combination products are expected to be approved to treat glaucoma, including:

- Pfizer's Xalcom (Xalatan+ the beta blocker timolol)
- Allergan's Combigan (Alphagan+timolol)
- Allergan's Lumigan+timolol
- Alcon's Travatan+timolol fixed dose (TTFC)

Doctors are excited about all of these combination products. Most sources believe they all provide a meaningful advantage over current therapies – better compliance. Among their comments:

- "Combination medications may improve some patients' consistency in usage."
- "All of these provide an advantage because of compliance issues."
- "When a second drop is needed, these newer combinations might help further reduce IOP without confusing patients, therefore increasing compliance."
- "The combination products should improve compliance in patients on complex medical therapy regimens...They will all have similar advantages with regards to compliance."
- "I will try the Travatan+timolol because of Travatan's track record of great reduction in IOP."
- "They will help because of compliance, but they are not ideal because of different dosing schedules."
- "Xalcom is probably good, but not Combigan. Xalcom will get a lot of use. Lumigan+timolol will pick up some users, but more will pick up Travatan+timolol."
- "Xalcom will be interesting, and Travatan+timolol will be helpful."

Except for the combination products, few doctors are aware of any other glaucoma medications on the near term horizon that might have a significant impact on their prescribing patterns. One doctor mentioned neuroprotectives as having potential.

