COLPOTROPHINE
(POSTMENOPAUSAL VAGINAL ATROPHY) -
FORECAST AND MARKET ANALYSIS TO 2022
Executive Summary

Colpotrophine (promestriene vaginal cream/ovule): Key Metrics in the Seven Major Pharmaceutical Markets

<table>
<thead>
<tr>
<th>2012 Market Sales</th>
<th>2022 Market Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>US NA</td>
<td>US NA</td>
</tr>
<tr>
<td>5EU $24.51m</td>
<td>5EU $21.66m</td>
</tr>
<tr>
<td>Japan NA</td>
<td>Japan NA</td>
</tr>
<tr>
<td>Total $24.51m</td>
<td>Total $21.66m</td>
</tr>
</tbody>
</table>

Key Events (2012–2022) | Level of Impact
Colpotrophine cream patent expiry in France, Spain and Italy in 2015 | ↓↓

Source: GlobalData
5EU = US, France, Germany, Italy, Spain, and UK
NA: Not Available

The above table provides a summary of Colpotrophine for postmenopausal vaginal atrophy (PVA) in the seven major pharmaceutical markets during the forecast period from 2012–2022.

Sales for Colpotrophine (conjugated estrogen cream) in the Global Postmenopausal Vaginal Atrophy Market

The global drug sales for Colpotrophine are forecast to decline from $24.51 million in 2012 to $21.66 million in 2022 at a Negative Compound Annual Growth Rate (CAGR) of 1.2%.

The major drivers of Colpotrophine sales growth in the Postmenopausal Vaginal Atrophy therapeutics market will include:

- Due to Colpotrophine’s favorable reimbursement status, the drug presents low out-of-pocket costs for patients
- Colpotrophine is available in both cream and ovule formulations allowing the product to capture large market share

The major hurdles for Colpotrophine sales of Postmenopausal Vaginal Atrophy therapeutics market will include:

- Colpotrophine’s patent expiry in the Spain, Italy and France in 2015 will severely impact sales during the forecast period
Executive Summary

The below figure illustrates the sales of Colpotrophine for postmenopausal vaginal atrophy (PVA) in the seven major markets during the forecast period.

What Do the Physicians Think?

“If there was a product that could be used, for example, once a week, with no side effects, that would be ideal.”

UK KOL, February 2013

“Certainly, the WHI study was a very large factor in terms of the heightened concerns about hormonal therapy.”

US KOL, February 2013

“I think we have bottomed out; all the scares wrapped around the WHI study have now been put into perspective.”

UK KOL, February 2013

“The percentage of patients who are treated will probably increase, based on the fact reassurances are being released by the North American Menopause Society and similar organizations.”

US KOL, February 2013

“With any drug, the mode of delivery and what the potential advantage it may have over current formulations is what matters.”

US KOL, February 2013

“There are all sorts of cultural reasons why women don’t come forward to ask about the possibilities of relief from this problem. Worldwide, there is a tremendous variation in terms of how it is managed.”

UK KOL, February 2013
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Introduction

2 Introduction

2.1 Catalyst

Although the postmenopausal vaginal atrophy (PVA) market has experienced anemic growth over the past decade, it is expected to undergo a considerable change between 2012 and 2022. Several market-leading therapies, including Pfizer’s Premarin (conjugated estrogens) and Merck’s Colpotrophine (promestriene), will lose patent protection between 2012 and 2015. In addition, a number of oral estrogens, vaginal patches, and vaginal creams will lose exclusivity, leading to a flood of cheaper generic options.

The launches of three novel drugs with improved safety profiles — Osphena (ospemifene), Vaginorm (prasterone), and BZA/CE (bazedoxifene + conjugated estrogens) — will bolster treatment-seeking behavior during the forecast period. These non-estrogenic therapies will shift the PVA treatment paradigm away from systemic estrogen therapies (ETs), such as pills, patches, and gels. Furthermore, healthcare reform under the Affordable Care Act (ACA) will increase the number of insured elderly US women, thereby potentially boosting treatment-seeking behavior for menopausal conditions. These dynamics will be reflected in the moderate growth of the overall PVA market during the forecast period, which will increase from $1.1108b in 2012 to $2.079bn in 2022 at a Compound Annual Growth Rate (CAGR) of 6.5%.

2.2 Related Reports


- GlobalData (2013). Estring (Postmenopausal Vaginal Atrophy)- Forecast and Market Analysis To 2022, July 2013, GDHC268DFR
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- GlobalData (2013). Vagifem (Postmenopausal Vaginal Atrophy)- Forecast and Market Analysis To 2022, July 2013, GDHC267DFR
- GlobalData (2013). Estrace (Postmenopausal Vaginal Atrophy)- Forecast and Market Analysis To 2022, July 2013, GDHC270DFR
- GlobalData (2013). Premarin (Postmenopausal Vaginal Atrophy)- Forecast and Market Analysis To 2022, July 2013, GDHC269DFR

2.3 Upcoming Related Reports

Appendix

7.7 About GlobalData

GlobalData is a leading global provider of business intelligence in the healthcare industry. GlobalData provides its clients with up-to-date information and analysis on the latest developments in drug research, disease analysis, and clinical research and development. Our integrated business intelligence solutions include a range of interactive online databases, analytical tools, reports and forecasts. Our analysis is supported by a 24/7 client support and analyst team.

GlobalData has offices in New York, Boston, London, India, and Singapore.

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