The Genitourological Pharmaceuticals Market

Strong growth expected to continue for genitourinary pharmaceuticals

Sales of genitourinary pharmaceuticals leaped nearly 10% in 1996 to $3.2 billion, and are expected to top the $4 billion mark by 1999.

The aging of baby boomers, improvements in genitourinary disease detection, and providers' use of medicine instead of surgery and psychotherapy are driving forces behind the market. In addition, market players are bolstering their positions through mergers and acquisitions.

This new FIND/SVP report gives you detailed segment-by-segment data—everything you need to stay on top of the market. Among the findings:

- Managed care is here to stay. What impact has it had on genitourinary disease diagnosis? What is the downside to HMO cancer care, especially in relation to chemotherapy reimbursement? How are HMOs handling controversial and experimental therapies? You'll find the answers in this report.

- Oncology products make up the largest segment of the genitourological pharmaceuticals market. FIND/SVP provides the most up-to-date information on each category of genitourinary cancer therapies, including cogent information on each cancer, and listings of the latest genitourinary cancer therapeutics and the companies producing them.

- Benign prostatic hyperplasia (BPH) therapeutics are the fastest-growing market segment, and segment sales will remain strong through the year 2000. This report gives you facts and figures on all market segments—along with information on the major trends shaping each of them.

- How many new drugs are currently in development for genitourinary cancer, erectile dysfunction, sexually transmitted diseases (STDs), and urinary tract infections? Who is producing them? What is their present status? Our tables and detailed analysis fill you in.

U.S. Market for Genitourinary Pharmaceuticals: Share of Sales by Sector, 1996

- Sexually Transmitted Diseases: 33.6%
- Benign Prostatic Hyperplasia: 16.3%
- Genitourinary Cancers: 34.1%
- Urinary Tract Infections: 8.9%
- Erectile Dysfunction: 1.5%
- Incontinence: 5.4%

Source: FIND/SVP

22 Profiles of U.S. and Foreign Competitors

- Abbott Laboratories
- Agouron Pharmaceuticals
- Bristol-Myers Squibb
- Chiron
- Connaught Laboratories
- Genentech
- Glaxo Wellcome Plc
- Hoffmann-La Roche
- Immunex
- Isis Pharmaceuticals
- Merck & Company
- Pfizer
- Pharmacia & Upjohn
- Quadra Logic Technologies
- Rhone-Poulenc Rorer
- Schering-Plough
- SmithKline Beecham
- U.S. Bioscience
- Wyeth-Ayerst
- Zeneca

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Increase in BPH diagnoses spur sales

In the United States eight out of ten men will develop BPH by age 70, generating 1.7 million physician-office visits annually. Several factors (including direct-to-customer pharmaceutical advertising, HMO’s emphasis on recent diagnostic techniques and preventative care) have played roles in BPH — and early prostate cancer — detection and treatment.

• An estimated 5.5 million men are treated annually for BPH and epidemiologists project that figure will reach 11 million by the end of the century.

• **Proscar**, a leading BPH pharmaceutical manufactured by Merck, experienced a jump of almost 20% in sales between 1994 and 1995. Growth is largely attributed to Merck’s sizable advertising campaign aimed at the customer.

• Three genitourinary therapeutics were ranked as the best-selling cancer therapies in the world in 1995: Eulexin, Zoladex, and Lupron, all indicated in the treatment of prostate cancer. Lupron, manufactured by TAP Pharmaceuticals, generated $880 million in sales in the United States in 1995.

Market players catering to an aging population

In all but one category — therapies for STDs — genitouriological pharmaceutical sales will be driven by aging baby boomers. As boomers grow older, dramatic political and economic changes will occur, especially in the provision of healthcare.

Increasing longevity is also buoying the market. The oldest segment, aged 85 and older, is growing at a faster rate than the rest of the elderly population.

• Boomers will not suffer in silence. Far more readily than former generations, they will discuss — and seek treatment for — conditions considered unspeakable, such as incontinence and erectile dysfunction. At least six drugs are now in trial to treat impotence. One of them, Pfizer’s Viagra, is reported to be effective in 65%-85% of men enrolled in studies.

• Sales of STD therapeutics are projected to reach $1.1 billion in 1996. About 12 million new STD cases occur each year, 66% of them in people under 25, and 25% in teenagers.

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