

357种疾病的诊疗状态与需求

—医药市场研究的“四大名捕”

2018年10月24日

SSRI 张俊

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一般做法

二手数据



大数据

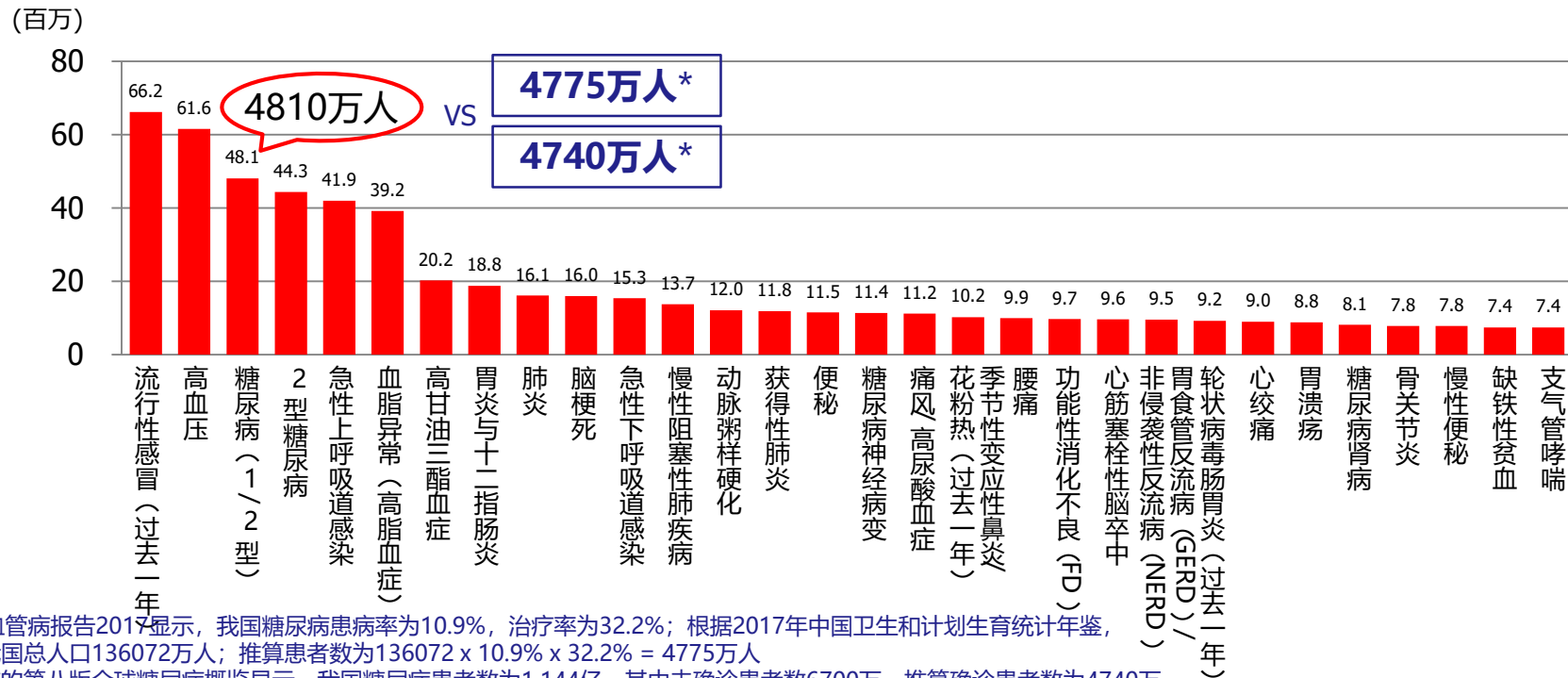


直接询问医生



中国什么样的疾病患者多？

中国 推算患者数TOP30疾病



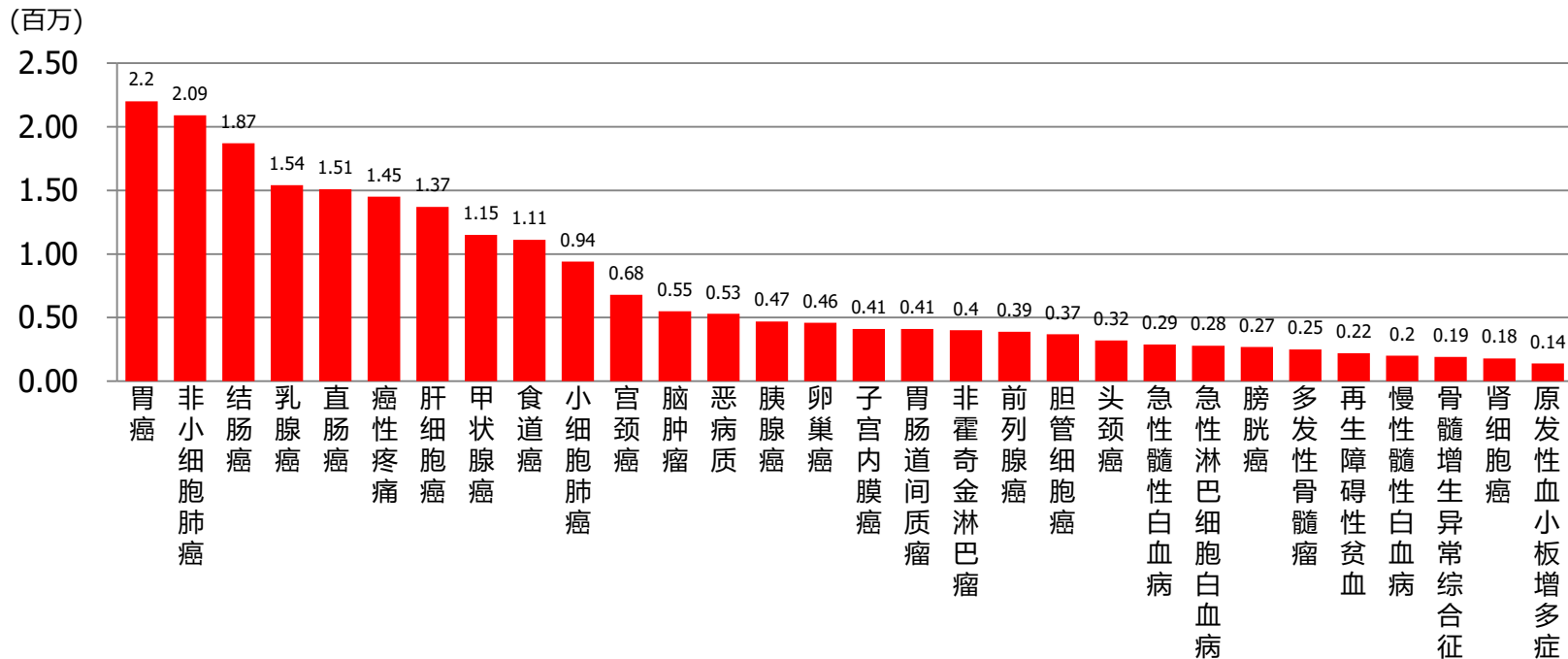
*中国心血管病报告2017显示，我国糖尿病患病率为10.9%，治疗率为32.2%；根据2017年中国卫生和计划生育统计年鉴，2013年我国总人口136072万人；推算患者数为136072 x 10.9% x 32.2% = 4775万人

* IDF发布的第八版全球糖尿病概览显示，我国糖尿病患者数为1.144亿，其中未确诊患者数6700万，推算确诊患者数为4740万

中国什么样的癌症患者多？

中国 推算癌症患者数TOP30

中国癌症中胃癌、非小细胞肺癌患者人数最多



市场规模

未满足的医药需求 (UMN)



市场集中度

销售代表访问

一般做法

经验



二手数据

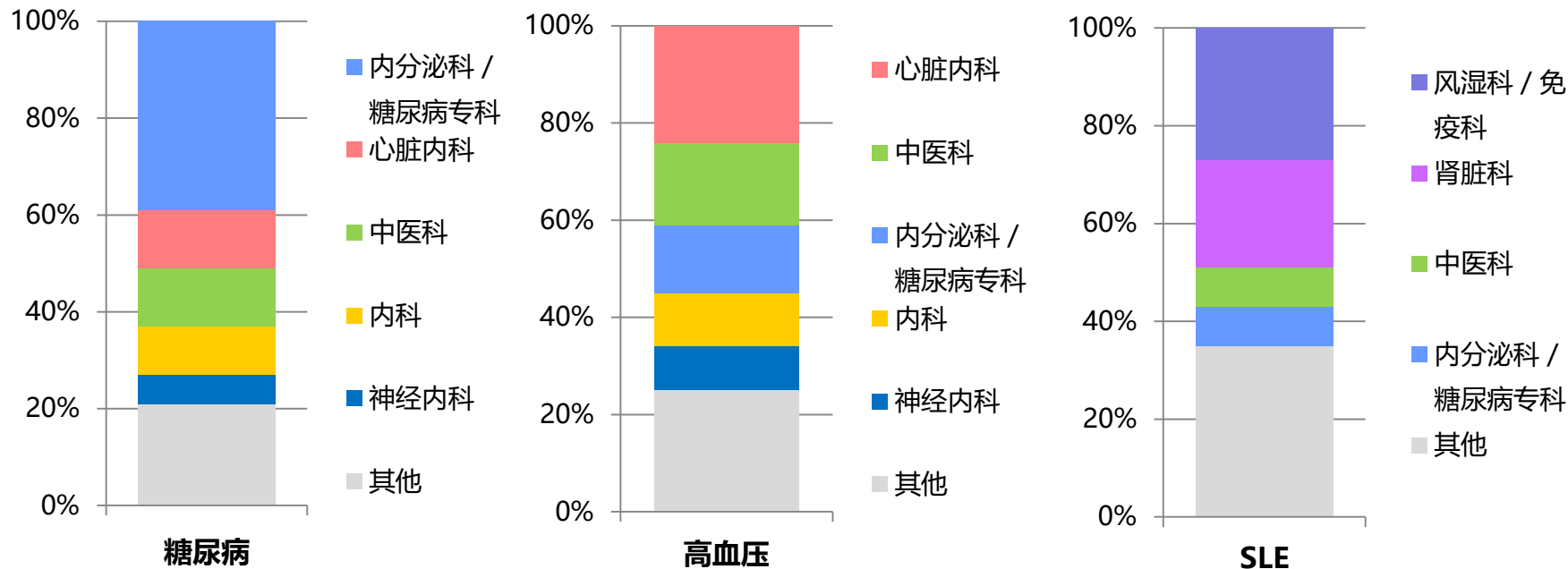


询问医生



市场集中度

哪个科室的医生?



市场集中度

看了多少患者?

[Back to disease list](#)
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[Nationwide Projection](#)
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[Nationwide Projection - Pts prescribed](#)

系统性红斑狼疮 (SLE) - 诊疗患者数

各科室平均患者数，各患者区间的医生分布

[上层：数/下层：比率]

	n	0	1	2	3	4	5	6	7	8	9	10-19	20-29	30-39	40-49	50-59	60-69	70-79	80-89	90-99	100-149	150-199	200-249	250-299	300-349	350-399	400-449	450-499	500-	平均
总体	10285	9340	434	205	94	22	66	14	5	16	3	50	12	12	3	4	2	-	2	1	-	-	-	-	-	-	-	-	-	0.4
	100.0	90.8	4.2	2.0	0.9	0.2	0.6	0.1	0.0	0.2	0.0	0.5	0.1	0.1	0.0	0.0	0.0	-	0.0	0.0	-	-	-	-	-	-	-	-	-	(n=10285)
内科	1328	1220	64	19	9	2	9	-	-	-	-	1	3	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.2
	100.0	91.9	4.8	1.4	0.7	0.2	0.7	-	-	-	-	0.1	0.2	0.1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	(n=1328)
老年病专科	188	164	14	6	2	-	1	-	-	-	-	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.2
	100.0	87.2	7.4	3.2	1.1	-	0.5	-	-	-	-	0.5	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	(n=188)
呼吸内科	414	376	24	10	2	-	1	-	-	-	-	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.2
	100.0	90.8	5.8	2.4	0.5	-	0.2	-	-	-	-	0.2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	(n=414)
消化内科	476	439	24	9	3	-	-	-	-	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.1
	100.0	92.2	5.0	1.9	0.6	-	-	-	-	0.2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	(n=476)
心脏内科	1105	1018	50	23	7	2	5	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.1
	100.0	92.1	4.5	2.1	0.6	0.2	0.5	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	(n=1105)
内分泌科 / 糖尿病专科	536	458	32	20	13	1	3	1	-	1	-	5	1	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0.5
	100.0	85.4	6.0	3.7	2.4	0.2	0.6	0.2	-	0.2	-	0.9	0.2	0.2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	(n=536)
风湿科 / 免疫科	84	22	-	3	5	1	7	5	-	4	-	16	4	8	3	1	2	-	2	1	-	-	-	-	-	-	-	-	-	14.6

市场规模

未满足的医药需求 (UMN)



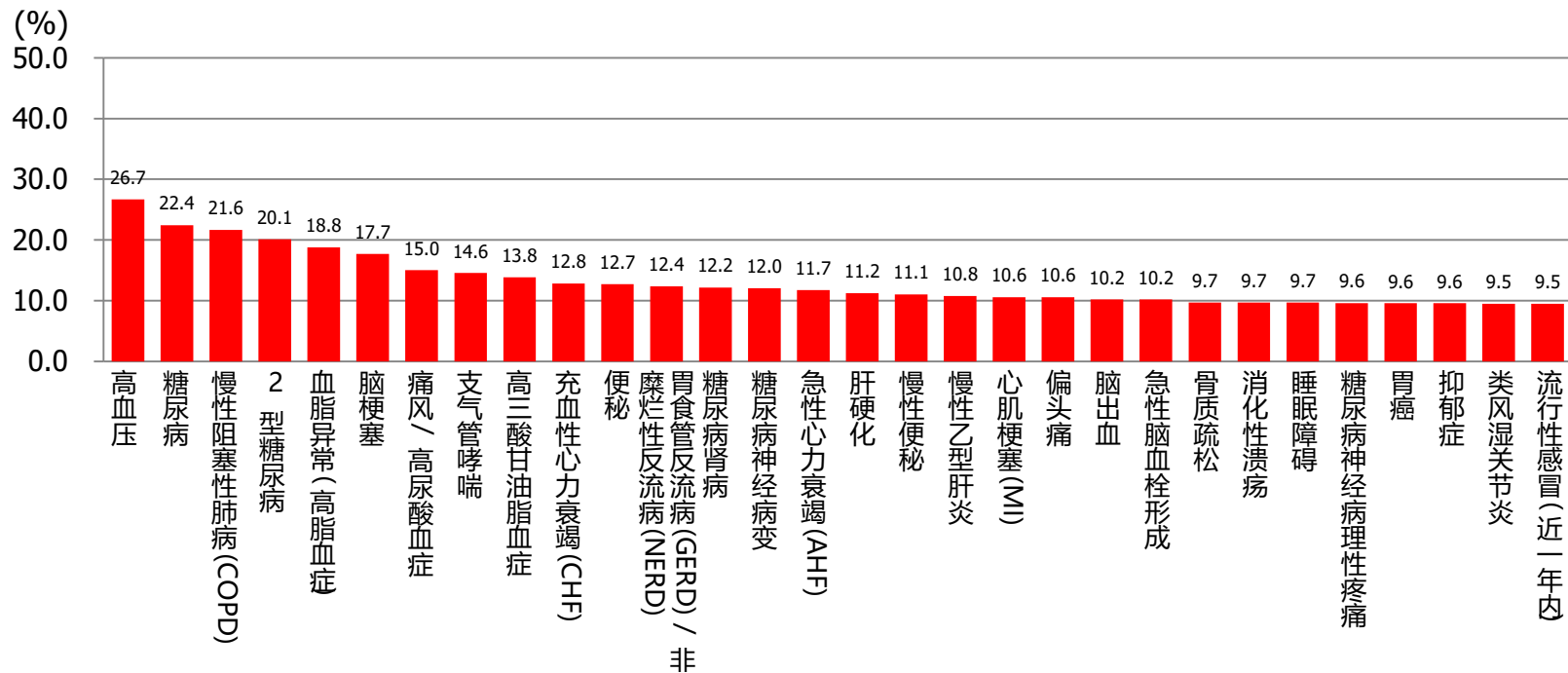
市场集中度

销售代表访问

中国有哪些新的药物需求?

中国 新药需求排名TOP30

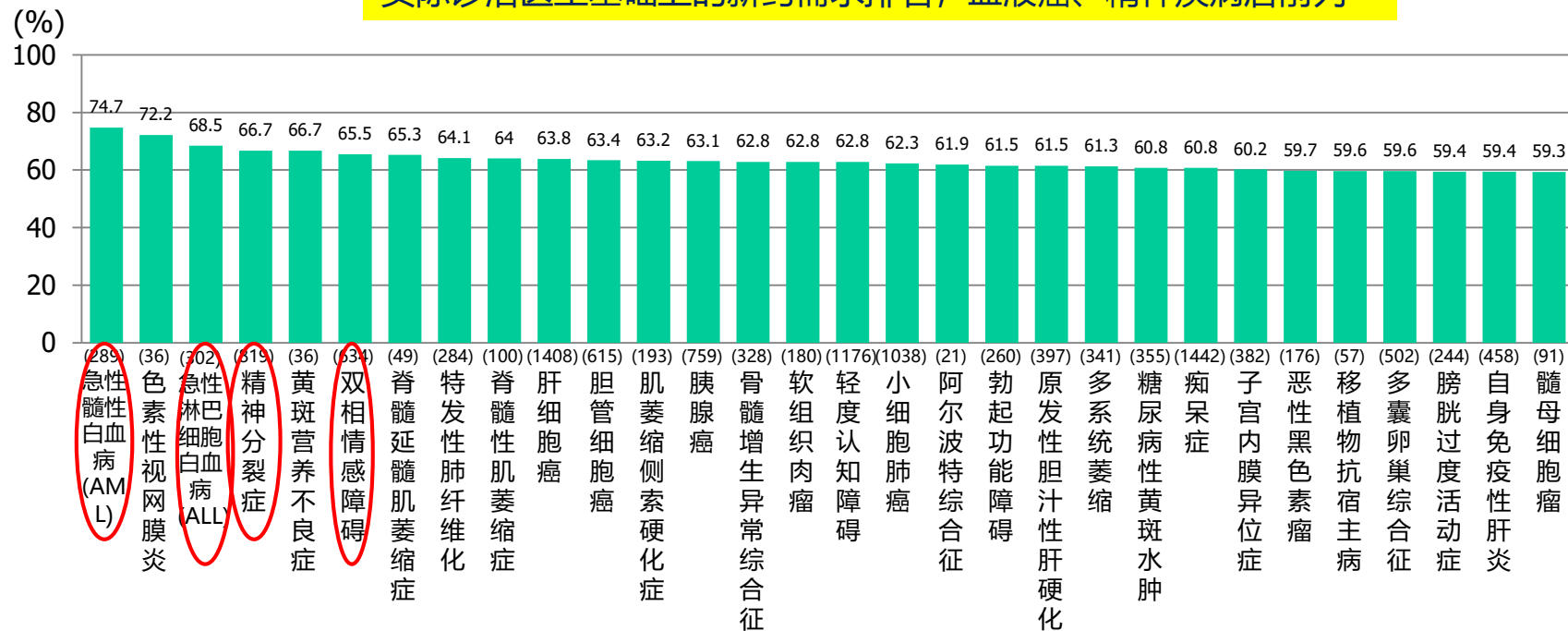
全体医生样本 n=10,285



中国有哪些新的药物需求?

中国 新药需求排名

实际诊治医生基础上的新药需求排名，血液癌、精神疾病居前列



()内为诊疗该疾病医生数

Source: PatientsMap2018CN



400种疾病的未满足医药需求研究



Unmet Medical Needs in Common and Rare Diseases

CONTACT

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Social Survey Research Information

Rare diseases have been attracting our attention in the healthcare industry as the markets with unfulfilled needs. But it has not been clear whether rarity indicates higher needs (=agnosed markets without sufficient product supply). To understand this, we looked into physicians' perceptions on the need for new treatment (=y-axis) among the physicians managing the conditions (X-axis) and patient population (bubble size) using a large-scale physician survey data in Japan (n=20049) (PatientsMap 2013, SSRI).

We found that the level of needs for new therapies in rare diseases are more "varied" than generally high - ranging from very high to a level similar to common chronic diseases.

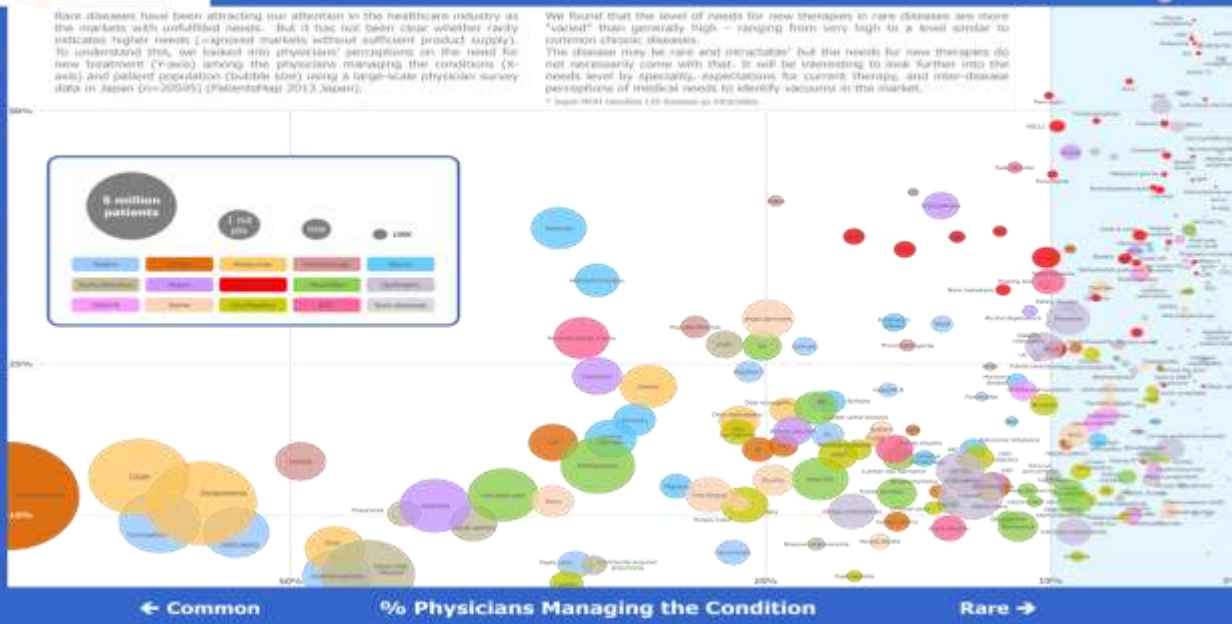
The diseases may be rare and "tractable" but the needs for new therapies do not necessarily come with that. It will be interesting to look further into the needs level by specialty, expectations for current therapy, and inter-disease perceptions of medical needs to identify "vacuums" in the market.

© Japan PBIR (condition 1-19) licensed by PATENTSCOPE

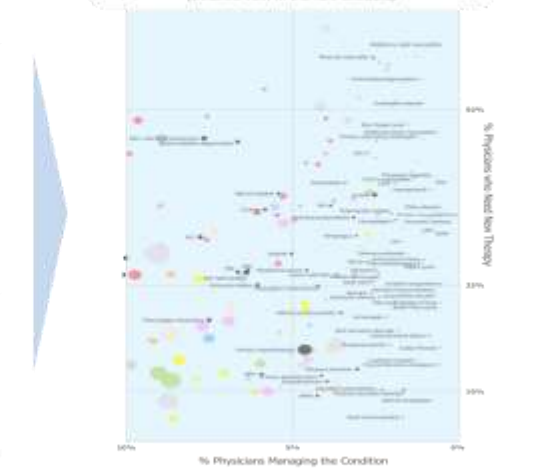
← High

Need for New Therapy

Low →



What are the grey spots in the main chart?
(Detailed view of the rare diseases)

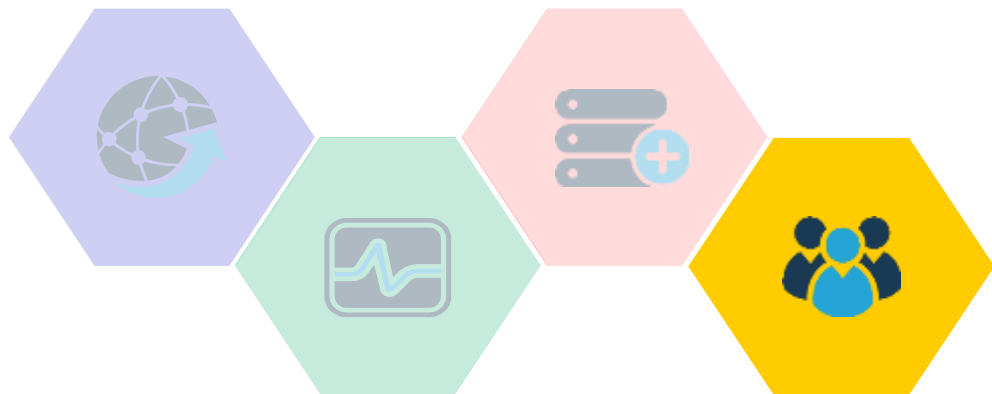


PatientsMap database describes the patient flow and other aspects e.g. unmet medical needs for 400+ conditions based on an annual web survey with 26,000+ physicians in Japan and the US. PatientsMap project is a joint collaboration of SSRI and m3.

1st place PBIRG AGM 2014

市场规模

未满足的医药需求 (UMN)



市场集中度

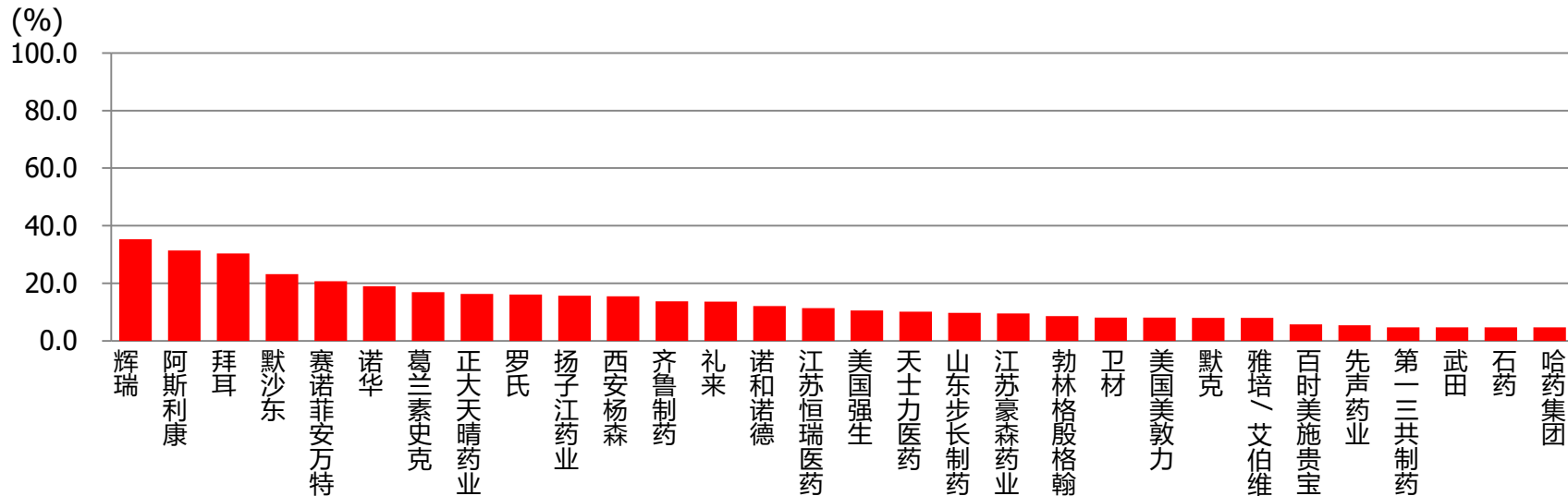
销售代表访问

活跃在中国医药市场的药企

中国 医药销售代表访问情况

辉瑞、阿斯利康、拜耳等外资企业排在前列

全体医生样本 n=10,285



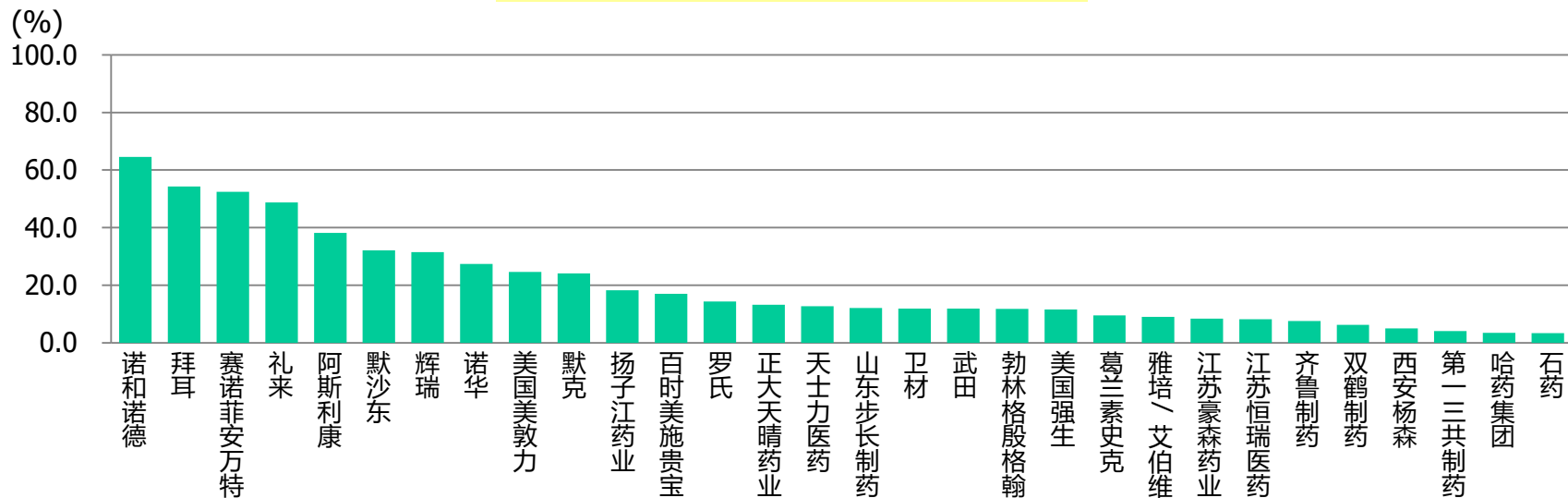
MR活跃的前30个药企

调研中提交了69家医药公司名单，医生选择有医药代表拜访过的公司

活跃在中国医药市场的药企

中国 糖尿病专科·内分泌科 医药销售代表访问情况

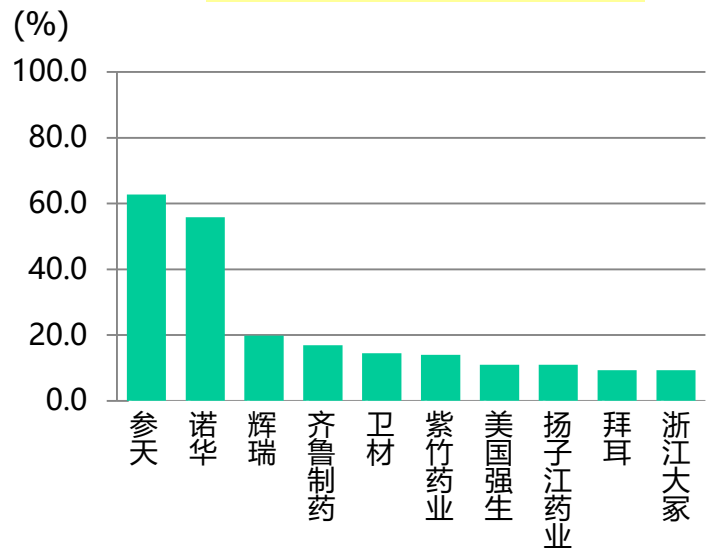
糖尿病专科·内分泌科 n=536



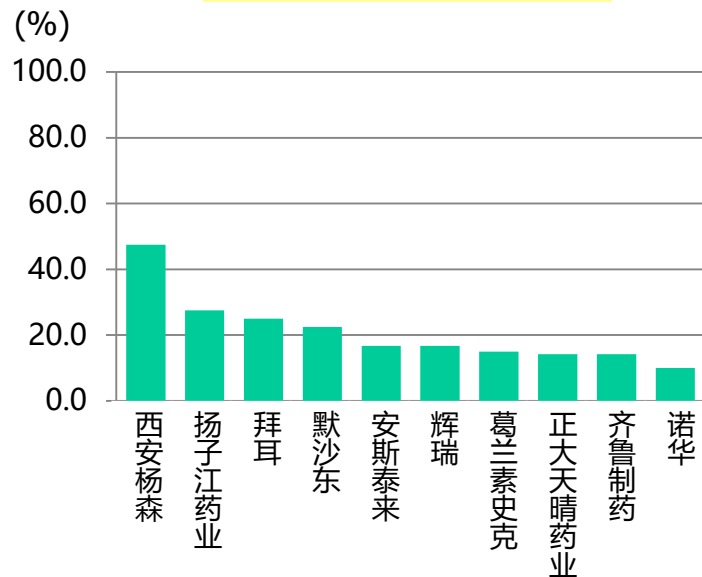
活跃在中国医药市场的药企

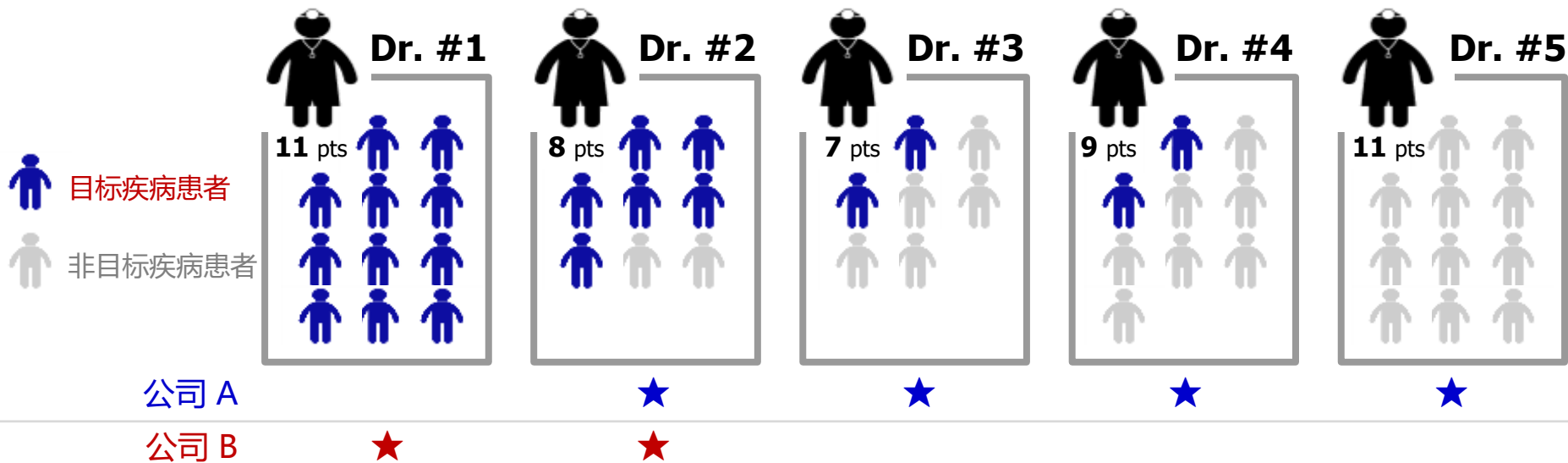
中国 眼科·皮肤科 MR访问情况

眼科 n=172



皮肤科 n=120





A公司:

- 4 名医药代表覆盖**48%**的目标患者 (10/21).



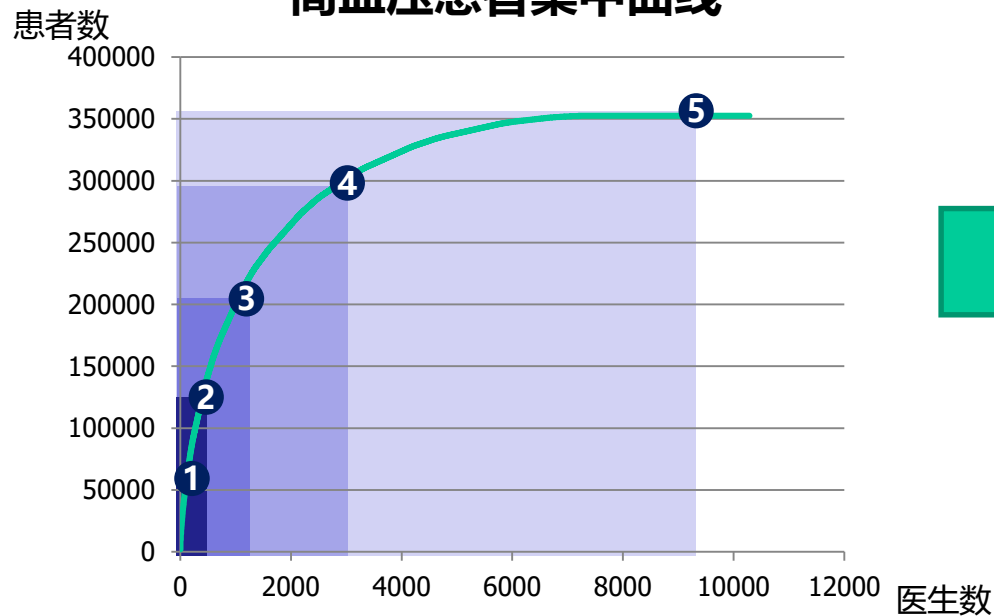
B公司:

- 2 名医药代表覆盖**81%**的目标患者 (17/21).

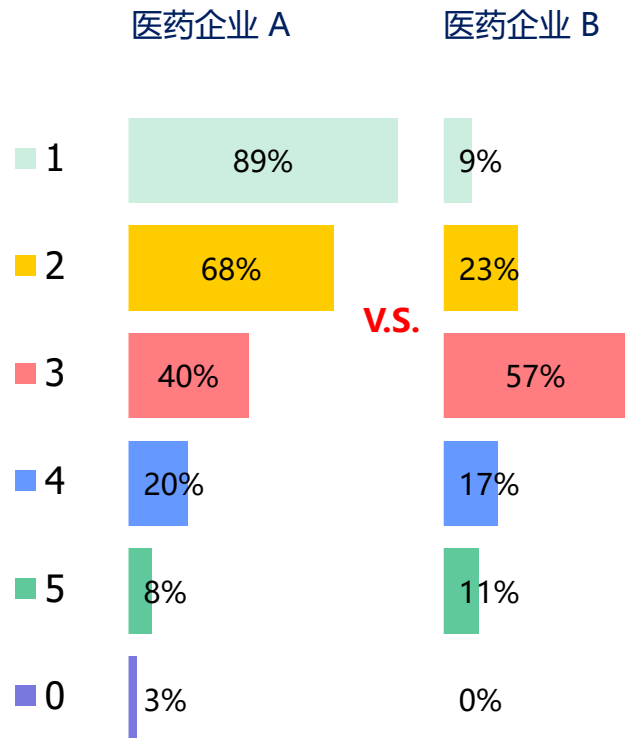


精确目标医生/医药销售代表资源分配

高血压患者集中曲线



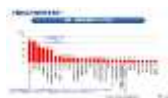
① 最多患者医生 ②较多患者医生 ③无患者医生



总结



市场规模



患者规模



市场变化



详细科室地区



市场集中度



科室



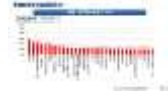
患者/甄別



校验/减少误差



UMN



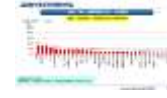
具体疾病新药需求



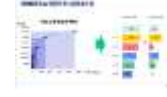
R&D,UMN



销售代表访问



访问情况



精确目标

谢谢聆听

THANK YOU!

艾斯信息咨询（大连）有限公司

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