



Bone and Mineral Metabolism (US)

OVERVIEW

The management of hyperphosphatemia, secondary hyperparathyroidism and vitamin D deficiency are challenging conditions to manage in dialysis patients. These conditions are also highly prevalent in later-stage CKD-ND patients. Current therapeutic options have multiple limitations and are associated with poor adherence.

This quarterly report series focuses on tracking key performance metrics for phosphate binders, calcimimetics and vitamin D agents in both the dialysis and CKD-ND settings. Emphasis is placed on recently launched products (Rayaldee and Parsabiv) and pipeline agents such as Ardelyx's tenapanor. The rapid field-to insight turnaround, highly relevant content and unparalleled market understanding make **RealTime Dynamix™** an essential tool for companies with commercial products in the space, those that will soon be launching and those looking for business development opportunities in nephrology.

SAMPLE & METHODOLOGY

Each quarter, ~200 US nephrologists complete an online survey. The respondents are recruited from the Spherix Network, proprietary panel of over 900 US nephrologists. Recruiting is managed to capture a regionally and demographically representative sample.

KEY QUESTIONS ANSWERED

- How are the most recently launched phosphate binders, Auryxia Velphoro, being incorporated into clinical practice? How does Auryxia's dual indication influence its use in the CKD-ND and dialysis settings? Is FMC's ownership of Velphoro influencing its use among nephrologists primarily affiliated with Fresenius?
- How do treatment rates and approaches for hyperphosphatemia and SHPT differ between dialysis and CKD-ND patients and how has this changed over time?
- At one year post launch, how is Rayaldee performing? What are the perceptions of the product and what are the major barriers to use?
- What are the differentiating characteristics of each brand?
- How is the use of CKD-MBD brands expected to shift in the near term?
- How do dialysis centers influence the use of certain products and how are formularies shifting for active vitamin D?
- Now that an IV calcimimetic is available, how is the overall use of this class shifting and to what degree is Parsabiv cannibalizing Sensipar vs. expanding the calcimimetic pool?
- What is the interest in tenapanor and how do US nephrologists plan to use this agent if approved?
- How does the level of promotion vary across brands in the CKD-MBD space and how does it compare to other areas in nephrology such as renal anemia or hyperkalemia?

Products Profiled

Commercial Products

AbbVie (Zemlar), Amgen (Parsabiv, Sensipar), Keryx (Auryxia), OPKO (Rayaldee), Sanofi Renal (Hectorol, Renvela) Shire (Fosrenol), Vifor FMC (Velphoro)

Generics: calcitriol, calcium carbonate, calcium acetate, sevelamer

Pipeline Agents

Ardelyx (Tenapanor), OPKO (Alpharen)

Publication Dates

- Q1 March
- Q2 June
- Q3 September
- Q4 December

Deliverables

- PowerPoint report with quarterly trending from Q3 2015
- Frequency table & summary statistics
- On-site presentation
- Proprietary questions (for purchasers of the annual series)

Related Reports 2018

- *RealTime Dynamix™: Renal Anemia US*
- *RealTime Dynamix™: Renal Dietitians US*
- *RealWorld Dynamix™: Chronic Kidney Disease US, Nephrology Perspective*
- *RealWorld Dynamix™: Chronic Kidney Disease US, PCP Perspective*
- *RealWorld Dynamix™: Dialysis US*