



## Renal Anemia (US)

### OVERVIEW

Renal anemia affects nearly all dialysis patients and a large proportion of CKD-ND patients as well. Present treatment consists of iron therapy (IV and oral) along with erythropoietin stimulating agents (ESAs). Use in dialysis is largely guided by dialysis chain contracts while use in CKD-ND is influenced by payer restrictions. A novel class of products, the HIF-PH inhibitors are currently in late stage development and will offer a new approach to managing this condition and may have safety advantages over current treatments. Additionally, the US market will soon see the introduction of the first biosimilar ESAs.

This monthly report series focuses on tracking key performance metrics for ESAs, IV Iron and Dialysate iron (Triferic). Emphasis is placed on recently launched products (Mircera and Triferic) and pipeline agents such as AstraZeneca/Fibrogen/Astellas'roxadustat and biosimilars. The rapid field-to-insight turnaround, highly relevant content and unparalleled market understanding make **RealTimeDynamix™** 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 month, ~100 US nephrologists complete an online survey. The respondents are recruited from the Spherix Network, proprietary panel of over 800 US nephrologists. Participants may participate once per quarter and must meet certain screening criteria. Recruiting is managed to capture a regionally and demographically representative sample.

### KEY QUESTIONS ANSWERED

- How can large dialysis organizations (LDOs) impact market share?
- How do treatment rates and approaches for managing renal anemia differ between dialysis and CKD-ND patients?
- How differentiated are ESA brands / IV Iron brands from one another?
- How is the use of ESA/Iron brands expected to shift in the near term?
- What is the perception of Triferic and how is it being adopted in the market?
- What are the perceptions about long-acting versus short-acting ESAs
- How is safety defined in the iron market? At what serum ferritin do nephrologists get concerned about safety?

### Products Profiled:

Aranesp (Amgen), Epogen (Amgen), Feraheme (AMAG), Ferrlecit (Allergan), Injectafer (American Regent), Mircera (Roche, FMC), Procrit (JNJ), Triferic (Rockwell Medical), Venofer (FMC)  
Generics: iron dextran

### Key Dates:

Comments and Proprietary Questions Due on the 12<sup>th</sup> of each month.  
Report publishes on the last day of each month

### Deliverables:

- PowerPoint report each month and annual compendium
- Frequency Tables & Summary Statistics
- On-site presentation

### Related Reports:

- RealTimeDynamix: Bone and Mineral Metabolism
- RealTimeDynamix: Renal Anemia EU5
- Caseload Dynamix: Nephrology