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# Assessing Market Opportunity and Entry Challenges in Mental Health Disorders

Content for this article was contributed by the EVERSANA Asia Pacific team

Although mental health disorders affect almost 264 million people worldwide, they are often misunderstood and misdiagnosed, and access is poor. The World Health Organization (WHO) reports that 80% of people in low- and middle-income countries receive no treatment for their mental health disorders.

As well as being underdiagnosed, mental health disorders are also poorly studied and an extremely challenging target for pharma companies. Obstacles include the high cost of conducting trials and generic competition.

An Asian pharma company recently partnered with a small biotech firm to develop and commercialize a novel therapy for indications within depression and anxiety. The company needed to characterize the nature and scale of the opportunity as well as the feasibility and sustainability of launching this drug in Asian markets.

The company encountered several challenges:

- ✔ The therapeutic area is poorly understood.
- ✔ Epidemiological studies are largely inaccurate, with under-reported figures in several countries.
- ✔ Patient segments are not clearly defined for treatment purposes.
- ✔ The complexities associated with clinical trials and inaccurate trial data make defining clear product profiles especially difficult.

To assess the opportunity in a way that provided confidence to decision-makers required both secondary and primary research for a comprehensive market overview. Respondents included experts and key opinion leaders (KOLs) in the therapy area to understand the major challenges a new entrant would face. Each market presented specific hurdles to patient uptake, such as the National Reimbursement Drug List (NRDL) listing in China and impact of hospitalization requirement in Japan.

Some of the key findings from this research:



**Epidemiology:** While the prevalence of mental health disorders in the general population is high, diagnosis rates are poor across countries, primarily due to the stigma associated with the disease.



**Specialty:** Along with psychiatrists, primary care physicians (PCPs) play a major role in treating and managing these patients, especially in China.



**Patient segments:** Patient segments are not clearly defined, due to the lack of consensus in applying severity rating scales.



**Treatment paradigm:** Selective serotonin reuptake inhibitors (SSRIs) and serotonin and norepinephrine reuptake inhibitors (SNRIs) are preferred in initial lines of treatment despite their poor efficacy, as generic versions are available at low cost.



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Qualitative and quantitative feedback on the Target Product Profile (TPP) in the target patient segments clarified the markets' views while also demonstrating the range of uncertainty in the epidemiology. This helped them make flexible plans and enabled them to develop market-specific entry strategies for their drug. For example, dosing and administration frequency for the drug was expected to vary by country. KOLs in China preferred fewer doses of the drug compared to other markets. Japanese physicians would not provide dosing frequency information until more data was made available. As dosing is an important factor in determining volume and revenue expectations, such insights helped the company plan their marketing and product positioning efforts ahead of time. Additional insights helped in mapping country-specific competitor profiles and developing plans to mitigate their effect on market share.

Patients suffering from mental health disorders are poorly served – the current standard of care is low, as are presentation, diagnosis and treatment rates. However, developing drugs for these conditions is extremely risky, as there are few objective measurements of efficacy and poor epidemiology data, and many countries have only a few specialists and little awareness. Supporting these patients by providing new therapies requires careful planning and testing of the target profile, as well as a KOL-informed understanding of what can be done at all stages of the patient journey.

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