

Erectile Dysfunction

An Expanding Market

Insight and Outlook from IMS HEALTH

There was a time when no one dared utter the words “erectile dysfunction” (ED) in polite company. However, with the introduction of a little blue pill called Viagra® in 1999, there is very little that remains unsaid about a condition that is believed to affect 10% to 30% of Canadian men. (Table 1 and Figure 1 depict ED visits by age and specialty.)

The rise of the market

While new treatments, notably Viagra, have only recently focused the public’s attention on this problem, the total market for ED medications has been experiencing steady growth since 1994. Between 1994 and 1998, ED prescriptions almost doubled, reaching just over 175,000 in 1998. With the advent of Viagra in March 1999, prescriptions dispensed in Canada for ED climbed to 655,000, almost quadrupling the market. While Viagra accounted for 75% of all ED prescriptions dispensed in 1999, it is interesting to note prescriptions for Muse® and for the male hormone testosterone also continued to grow that year.

What is being prescribed?

Today, Viagra is by the far the most common treatment for ED, representing 90% of the 1.3 million prescriptions dispensed in Canada in 2003 (12 months ending in September 2003) (Figure 2). The usual 50 mg recommended dose is taken about one hour before sexual activity.

Testosterone is the second most recommended therapy for treating ED, representing almost 91,000 prescriptions or 7% of all ED prescriptions.

Caverject®, Muse, and Yohimbine each account for 1%, or approximately 13,000 prescriptions. Some older ED therapies, such as Muse and Caverject, are administered by insertion or injection, respectively. Yohimbine, an active compound from the bark of the Yohimbine tree, is taken orally and enhances erection and skin sensitivity.

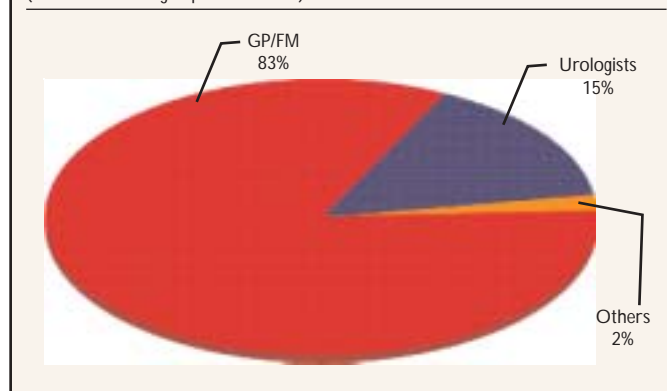
Table 1

Age breakdown of ED visits to office-based physicians (12 months ending September 2003)

Age group	Percentage of visits
0-39	6%
40-64	67%
65 and over	27%

Source: IMS Health, Canadian Disease and Therapeutic Index.

Figure 1. Share of ED visits made to office-based physicians (12 months ending September 2003).

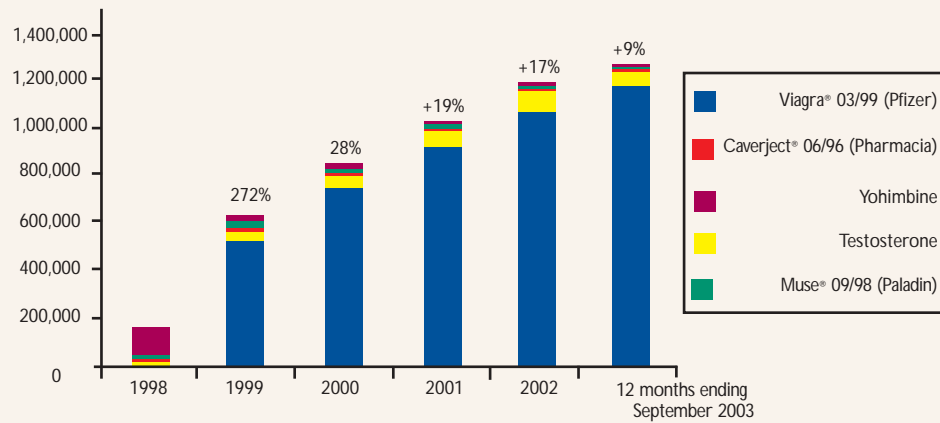


Source: IMS Health, Canadian Disease and Therapeutic Index.

What are the new medications?

Health Canada has recently given its approval to Eli Lilly’s Cialis®, a new prescription pill for the treatment of ED that became available in Canada in late November 2003. Cialis remains effective up to 36 hours after its ingestion. Bayer and its partner, GlaxoSmithKline, are currently seeking permission from Health Canada for Levitra®, another ED medication, which remains effective for up to five hours.

Figure 2. Estimated number of ED prescriptions dispensed in Canadian retail pharmacies.



Source: IMS Health Canada, CompuScript.

The newer medications act the same way as Viagra. They increase blood flow to the penis by blocking the action of an enzyme called phosphodiesterase-5 (PDE-5), which the body uses to reverse the erection process. By blocking PDE-5, the drugs enhance the body's own signals to increase blood flow to the penis. **CPM**

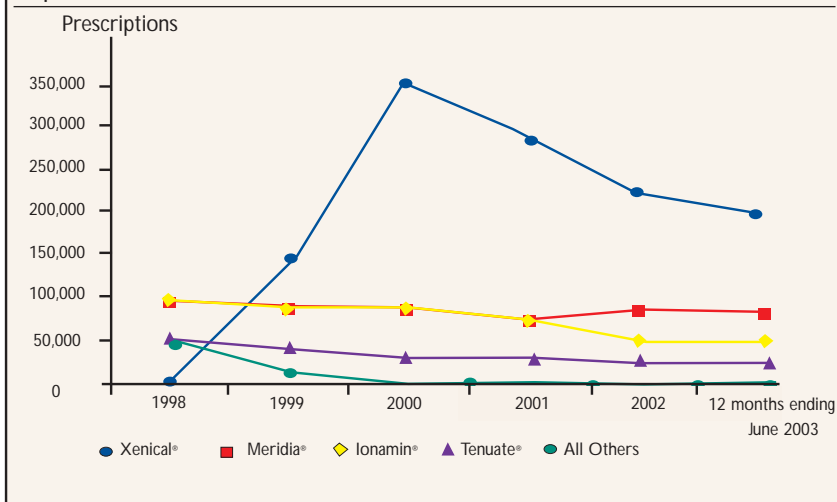
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Figure 4. Estimated number of anti-obesity prescriptions dispensed from 1998 to June 2003.



Source: IMS Health Canada, CompuScript.

Correction: In the Winter 2003 issue of Canadian Pharmaceutical Marketing, there was an error in the Therapeutic Trends department. Table 4 on page 36 showed Xenical® to be the least prescribed anti-obesity drug. In fact, from 1998 to June 2003, Xenical was the most prescribed drug in this category. The figure has been reprinted in its correct version. We apologize to our readers.