

Nutrition Health Economics and Outcomes Research (nHEOR)

Illustrating the value of medical nutrition with health economics and outcomes evidence

The Medical Nutrition (MN) market is projected to grow up exponentially to ¼ of the global market size – USD 20b in 2025. This is driven by factors including:

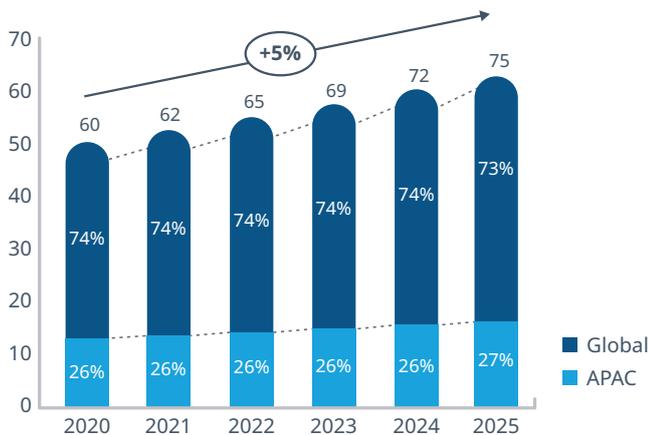
1. **Population growth** with increasing size of the geriatric and infant (including premature) subpopulations
2. **Expanding health services** uncovering malnutrition issues within the population, as well as rare diseases and post-surgical nutrition
3. Rising prevalence of **lifestyle-associated diseases** requiring nutritional intervention

The current MN industry trend in Asia Pacific (APAC) focuses largely on conventional marketing claims and product branding efforts. Though critical to business success, these efforts have a narrow perspective that rely only on subjective consumer experience.



Medical nutrition market & anticipated growth

(CAGR 2020-2025) APAC = 5.7% vs Global = 4.8%



Source: The “Global Clinical Nutrition Market 2020-2025” report

What is HEOR evidence?

Health Economics and Outcomes Research (HEOR) is a discipline that is used to complement traditional clinical development information (i.e, efficacy, safety, quality) to guide decision makers regarding patient or population access to therapeutic and nutritional products and services.

THE TECHNIQUES USED FOR HEOR TYPICALLY INCLUDE:

- Various types of analysis for product cost vs benefits
- Evaluation of the burden of a disease/condition burden for a society or health system
- Real world effectiveness and impact assessment via interventional/observational data

These researches can provide data to support directly or indirectly the healthcare managers, policy makers and payers determine if a particular intervention work in the populations they serve, and how much of the intervention should cost.

Critical role of nHEOR evidence

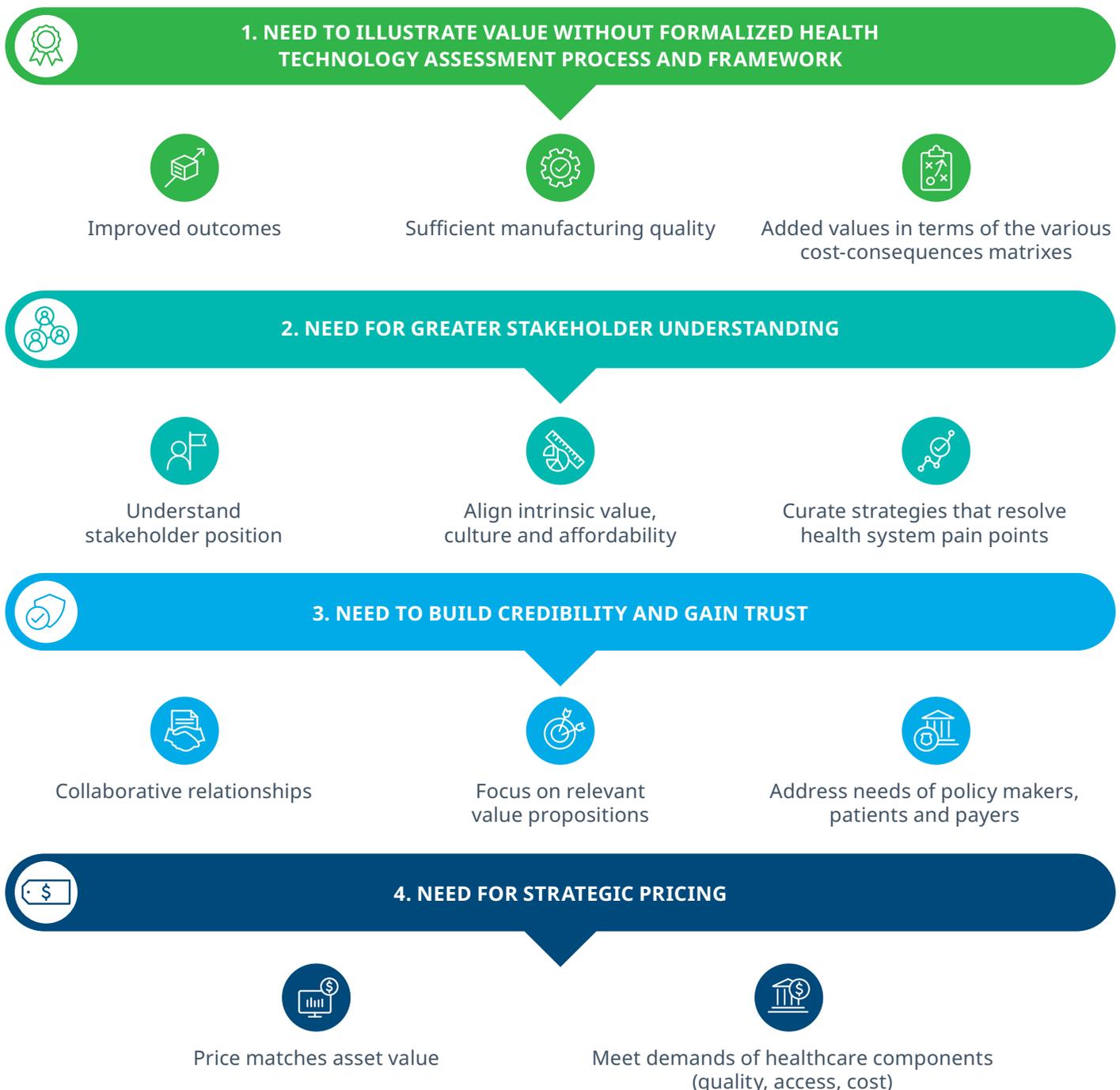
HEOR EVIDENCE DEVELOPMENT FROM THE MEDICAL NUTRITION INDUSTRY HELPS TO:

-  Fill the vacuum of understanding in the unmet population nutrition needs
-  Clarify product values
-  Align health system priorities

A balanced investment in nHEOR evidence development is critical to ensure that all key health system stakeholders are consistently informed and aligned to advance the medical nutrition company's market access.

Medical nutrition market access pain points in APAC

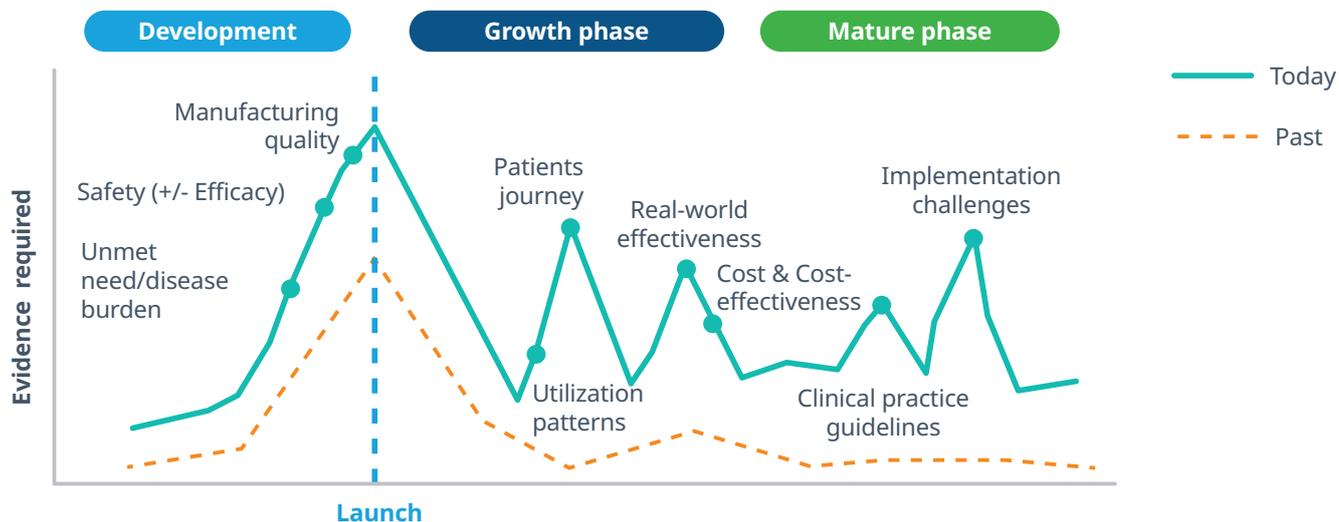
While the APAC market is attractive, medical nutrition companies face several hurdles in achieving successful market access. The following are the 4 most critical pain points that need to be tackled to yield results:



Advancing market access for medical nutrition companies

MN companies can leverage on the quality data generated from their HEOR efforts to shape the value narrative of their products to their stakeholders. This could range from highlighting an unmet need that might not be widely recognized, to illustrating the real-world benefits observed from using the product as well as any potential efficiency gain and societal benefits the product may offer beyond their immediate beneficiaries.

Evidence development across product lifecycle



Patterns of product uptake - who prescribed? Who consumed? For what indications? In which part of the care journey? temporal trending of the above.

Utilization patterns



From initial care seeking to their first experience with the nutrition product - perception, experience, PRO, etc. What is the counterfactual story? (User-non-user-study)

Patient journey



What is the real-world effects of the nutrition products compared to clinical trials? Why are they better/worse? What is needed to ensure real world effectiveness and impact?

Real-world effectiveness



What are the costs of care under a specific health system and social set-up? Is my product cost-effective? What drives the CE outcome? What is the value justified pricing?

Cost & CE of Care



How to ensure consistent clinical practice to maximize patient and societal benefits? What are the implementation challenges and strategies to optimizing the product benefits?

Clinical practice and implementation

nHEOR evidence can help address health system stakeholder evidence needs along a MN product lifecycle. Optimal study design to address evidence needs along a MN product lifecycle is dependent on factors such as research questions, data availability and country-specific considerations. Each study design has its respective considerations and implications, which must be tailored accordingly.

Case Study: Very-low-calorie-diet (VLCD) with meal replacement products (MRP) for diabetes reversal

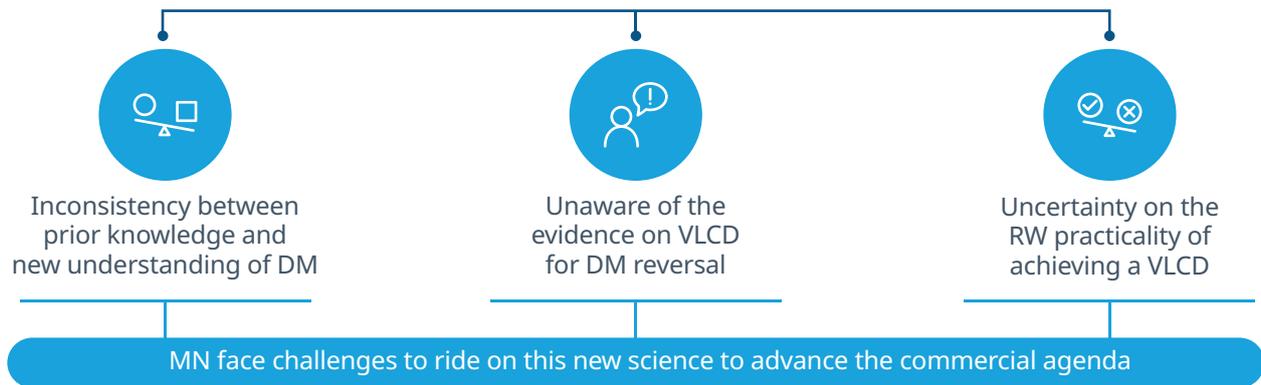
BACKGROUND

Controlled studies demonstrated VLCD potential to reverse Type 2 Diabetes Mellitus (DM) which is further corroborated by major clinical guidelines. There is a huge market potential for dietary intervention to reverse Diabetes Mellitus and a golden opportunity for MRP companies to market their MRP as a part of the VLCD plan.

SITUATION AND CHALLENGES

The idea of reversing DM, particularly via VLCD has not been well received by the local medical community.

Main reasons



SOLUTION AND OUTCOMES - ROLE OF NHEOR AND RWE



Focused evidence synthesis to strengthen the efficacy and safety messages of VLCD on diabetes reversal



Real-world study to illustrate real life outcomes and VLCD practicality



Health economic evaluation to demonstrate the economic value of VLCD with MRP on diabetes reversal to the health system and society

Talk to us to understand how our HEOR and RWE experts in IQVIA can help you capture the growing Medical Nutrition market in APAC and overcome the market access hurdles