



Date 29th March, 1985. Copy to Brian
To Linda
From Walid
Subject Area 2 - North and Wales - February report

Koate HT and Konyne HT Market Report

The activity seen in December 84 and January 85 with regard to AIDS and Factor VIII. Concentrate has slowed down during February.

All centres in this region have now converted from regular commercial to heat-treated commercial material. Although opinion is still divided on the use of non heat-treated NHS material, more centres have now decided to use heat-treated commercial material in preference to regular NHS material.

The following is an update on changes taking place.

A TRENT REGION

1. Sheffield - After laying down the policy for the region last month that they would continue to use regular NHS, Sheffield have now completely converted to heat-treated commercial Factor VIII and IX.
2. Leicester - They are now mainly using commercial Factor IX, however, less heat-treated commercial Factor VIII is being sold there owing to the fact that Sheffield and Derby's quota of Factor VIII is going to Leicester. Also, because of the rise in the cost of prophylactic treatment, it has been mainly stopped.
3. Derby - They have now completely converted to heat-treated Factor VIII and IX.
4. Lincoln and Nottingham - They still prefer regular NHS to heat-treated commercial material.

B NORTH WEST REGION

1. Liverpool - They have now decided to exchange regular commercial material for heat-treated commercial. Regular NHS material is being used.
2. Manchester area - The signs are indicating that the Manchester area will possibly start using Factor IX heat-treated commercial material in April/May. Regular NHS Factor VIII is being used.



C. YORKSHIRE REGION

No changes have taken place, the policy was to use up old stock and then purchase heat-treated Factor VIII commercial material. NHS regular material is being used.

D. WALES

1. Bangor - They have switched from regular to heat-treated Factor VIII commercial material.
2. Cardiff - They are using only heat-treated Factor VIII, both commercial and NHS. Cardiff is now considering purchasing commercial heat-treated Factor IX.

E. NORTH EAST REGION

As well as heat-treated commercial Factor VIII, the North East region is now using heat-treated commercial Factor IX. Regular NHS material is only being used for inhibitor patients.

Koate HT and Konyne HT Sales report

Koate HT sales figures for February were again well above budget. The number of units sold was 1634020 I.U. which must make it a record month with a record sales value of £198415 at a record a.s.p. of 12 pence per unit.

The stock situation, however, began to deteriorate towards the end of February and it is now at an all time low. This means that sales could slim within the months of April and May.

The consequences of the stock situation could be that faithful clients will have no alternative but to seek a supply from one of our competitors.

Sales of Konyne HT, which began slowly in late January, have increased in February and this trend is expected to continue during the next few months. Every effort is being made to take advantage of the Factor IX market. During this month, sales to Derby have doubled and a new Konyne HT account in Leicester was obtained. Sales of Konyne HT to Newcastle, however, have not yet been made. Ground work is being prepared in order to obtain a share of the business.

Development in Major Target Accounts

1. The Manchester connections - Dr. Wensley was visited in order to maintain our chances of obtaining all or a share of the business. However, stock problems have put us in a position where we are now having to make it difficult for him to award the contract or part of it to Cutter. This is extremely disappointing after having worked on this centre for eight months. However, should the region decide to purchase heat-treated Factor IX and should Cutter's price and promises be set at the correct level, we may obtain all or part of the Factor IX business which is estimated to be around 500,000 I.U.

2. The Leeds connection - Although communication by telephone and letters has continued, no visits were made to this centre. This is again due to lack of stock. While we were last month promised a share of the business, we may now have to forget it. This is again very disappointing, owing to the fact that a lot of hard work has gone into this centre during the last eight months in order to persuade Dr. Swinburne to use Koate HT.

Koate HT and Konyne HT Competitors report

Factor VIII

- ARMOUR They remain market leaders. They seem to have overcome their supply problems. Their sales have also rocketed up. It is quoted that their sales to the Birmingham region alone will be in the range of 6 million I.U. at 12 pence per unit.
- ALPHA They too seem to have overcome their supply problem. Their market share has soared from approximately 15% to 25% within the last four months. This has been due mainly to the fact that more evidence is becoming available to suggest that their product is Non A Non B hepatitis safe. Their price remains 14 pence per I.U.
- TRAVENOL They could become a serious problem within the months ahead should they continue on the same pricing levels. Travenol has gained a contract for 3 million I.U. at St. Thomas' Hospital and they are about to gain another contract from Manchester for 2 million I.U. Their pricing level on both occasions has been in the range of 10.5 pence per unit. They have left the market when it ceased to be profitable and now as it is becoming profitable, they obviously wish to re-enter it.
- Although Travenol's price cut policy could lead to a price war, it is unlikely that this will take place, at least for the time being when demand is almost greater than supply. However, it is certain that they will be a problem within the months ahead should they wish to expand in the market at a time when supply will become greater than demand.
- IMMUNO Immuno's share of the market has decreased even further, probably down to 1% - 2%. This is due to an asking price of 14 pence per unit for a product which is dry heat-treated

Factor IX

- ARMOUR They still have no product. However, they anticipate having heat-treated Factor IX available in the UK at the beginning of July. Pricing levels are not clear yet.

Factor IX (cont)

- ALPHA They are now market leaders in the commercial Factor IX HT market with the advantage of selling a wet treated product at the same price as Cutter's dry treated product, i.e. 14pence per unit. Alpha have revised their price from 16p to 14p per unit.
- IMMUNO They now have a product which is heat-treated. No sales have yet, to my knowledge, been made. This is probably due to an asking price of 20 pence per unit. Immuno also have heat-treated FIEBA available. This has upset our Factor IX HT sales plans, as we were hoping to have an advantage on the regular non heat-treated FIEBA.
- TRAVENOL They have a product priced at 20 pence per unit. I am certain, however, that this price will come down at least to our pricing level very soon. I have no knowledge of any market activity in the Factor IX area, however, I would expect Travenol to make a move very soon now. It is obvious that there is a small but profitable Factor IX market.
- They must be watched very closely.

Gamimune Report

The following potential accounts were visited.

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| 1. | Dr. Barnes | - | Royal Liverpool Hospital |
| 2. | Dr. Newsome | - | Royal Blackburn Infirmary |
| 3. | Dr. Roberts | - | Leeds General Infirmary |
| 4. | Dr. Gupta | - | Derby City Hospital |
| 5. | Dr. Saunders | - | Newcastle General Hospital |
| 6. | Dr. Freeman, | | |
| | Dr. Tinegate | - | Freeman Hospital, Newcastle |
| 7. | Dr. Stevens | - | Walton Hospital, Liverpool |
| 8. | Dr. Stevens | - | Manchester Children's Hospital |
| 9. | Dr. Payne | - | Ronkswood Hospital, Worcester |

Gamimune was discussed with mixed interest. Most of these centres will be visited again within the next six weeks.

Reports from visits to Wolverhampton (Dr. Patel) and Derby (Dr. Mitchell) were disappointing in terms of patients' response to Gamimune. Gamimune was used in these centres on patients with ITP, Haemolytic Anaemia and Aplastic Anaemia. It is unlikely that this will encourage them to use Gamimune in the future. (Both centres have bought Gamimune to the value of £7500)

It has been agreed with Dr. Milford-Ward of the Royal Hallamshire Hospital, Sheffield that a Gamimune meeting is to be held at this hospital on 24th April, 1985. This will be an afternoon Symposium. We are hoping to host approximately fifty guests from the largest teaching hospitals in the Midlands and the North of England. This meeting is being held in order to maintain and

increase interest in the field of Intravenous Immunoglobulin Therapy in both Haematology and Immunology.

Gamimune Sales

Gamimune sales were again very low, despite obtaining a new account at Manchester Children's Hospital. All efforts made in order to expand this market will continue.

Meetings

Two meetings were attended in February, they are as follows.

1. Gamimune Meeting - Hosted by Dr. Jaliha1, Huddersfield Royal Infirmary.

This was an informative and an interesting lunchtime seminar held on the use of Gamimune in ITP and Aplasia; with some promising results. However, it was disappointing that there were no medical personnel invited and the majority were M.L.S.O.'s. Nevertheless, Dr. Jaliha1 is a small but consistent user of Gamimune and our support of him must continue.

2. Haemophilia Society Meeting (Lincoln) - This meeting was organised by Sister Brenda Brown of the Lincoln County Hospital.

Slides of "Hereditary Haemophilia" and "Inside a Bleeding Joint" were shown. It was a low turn out.