

MARKET REPORT



EPIOMIC EPIDEMIOLOGY SERIES: CHRONIC HEART FAILURE FORECAST IN 12 MAJOR MARKETS 2018-2028

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EPIOMIC EPIDEMIOLOGY SERIES: CHRONIC HEART FAILURE FORECAST IN 12 MAJOR MARKETS 2018-2028

Black Swan Analysis Epiomic™ Epidemiology Series Forecast Report on Chronic Heart Failure in 12 Major Markets

Chronic heart failure (CHF) is a chronic disease during which the heart is not able to supply sufficient blood flow to the body. Exacerbations of CHF are characterised by dyspnoea at rest or on exertion and worsening fluid retention, apparent as lung congestion and/or swollen ankles and legs. The disease is associated with toxic, inflammatory and infective heart damage, structural, metabolic and genetic heart abnormalities, as well as cardiovascular risk factors, such as smoking, sedentary lifestyle, unhealthy diet and alcohol consumption.

This report provides the current prevalent population for chronic heart failure across 12 Major Markets (USA, Canada, France, Germany, Italy, Spain, UK, Russia, Japan, China, Brazil & India) split by gender and 5-year age cohort. Along with the current prevalence, the report also contains a disease overview of the risk factors, disease diagnosis and prognosis along with specific variations by geography and ethnicity.

Providing a value-added level of insight from the analysis team at Black Swan, patient populations with the two types of chronic heart failure, as well as several of the main symptoms and co-morbidities of chronic heart failure have been quantified and presented alongside the overall prevalence figures. These sub-populations within the main disease are also included at a country level across the 10-year forecast snapshot.

Main symptoms and co-morbidities for chronic heart failure include:

- Arterial hypertension
- Coronary artery disease
- Atrial fibrillation
- Diabetes mellitus
- Metabolic syndrome
- Obesity
- Renal dysfunction
- Chronic obstructive pulmonary disease (COPD)
- Pulmonary hypertension
- Sleep apnoea
- Anaemia

This report is built using data and information sourced from the proprietary Epiomic patient segmentation database. To generate accurate patient population estimates, the Epiomic database utilises a combination of several world class sources that deliver the most up to date information from patient registries, clinical trials and epidemiology studies. All of the sources used to generate the data and analysis have been identified in the report.

Reason to buy

- Able to quantify patient populations in global chronic heart failure market to target the development of future products, pricing strategies and launch plans.

- Gain further insight into the prevalence of the subdivided types of chronic heart failure and identify patient segments with high potential.
- Delivery of more accurate information for clinical trials in study sizing and realistic patient recruitment for various countries.
- Provide a level of understanding on the impact from specific co-morbid conditions on chronic heart failure's prevalent population.
- Identify sub-populations within chronic heart failure which require treatment.
- Gain an understanding of the specific markets that have the largest number of chronic heart failure patients.

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Black Swan Analysis, founded in 2007, is a unique analysis practice that provides robust valuations and commercialisation plans to optimise products in the healthcare industry. We know what it takes to succeed in this industry -we've seen what works and what doesn't and we are committed to bringing insight and high quality solutions to our clients. In doing so we help them meet the many challenges of today's complex healthcare marketplace.

The Black Swan team has a unique skill set: the ability to develop dynamic market forecasts and interactive patient flow models using a wide range of data including complex pathological and epidemiological information. As pharmaceutical and healthcare companies are challenged to deliver more specific targets that align with unmet medical needs. These modelling approaches are more commercially focused to meet the requirements of a changing healthcare environment.

We have the capability to provide an immediate and 'hands-on' approach with every client and where the right

internal expertise is leveraged we can help find your optimal solution. Using our bespoke methodologies and frameworks we seek to assess the most challenging valuations.

The valuation outputs we generate can be easily integrated with any in-house existing financial systems, presentation styles or platforms that may be currently operational. This ensures a faster uptake within the business, enabling resources to be re-directed towards implementing the outputs and leveraging new information.

Our philosophy at Black Swan is to create the right environment using inclusive dialogues and collaboration that enable us to generate outputs that make business decisions clear. Our goal is to provide an unparalleled level of satisfaction and quality for our clients.

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