

Rare diseases have been attracting our attention in the healthcare industry as the markets with unfulfilled needs. But it has not been clear whether rarity indicates higher needs (=ignored markets without sufficient product supply). To understand this, we looked into physicians' perceptions on the need for new treatment (Y-axis) among the physicians managing the conditions (X-axis) and patient population (bubble size) using a large-scale physician survey data in Japan (n=20595) (PatientsMap 2013 Japan).

We found that the level of needs for new therapies in rare diseases are more "varied" than generally high – ranging from very high to a level similar to common chronic diseases.

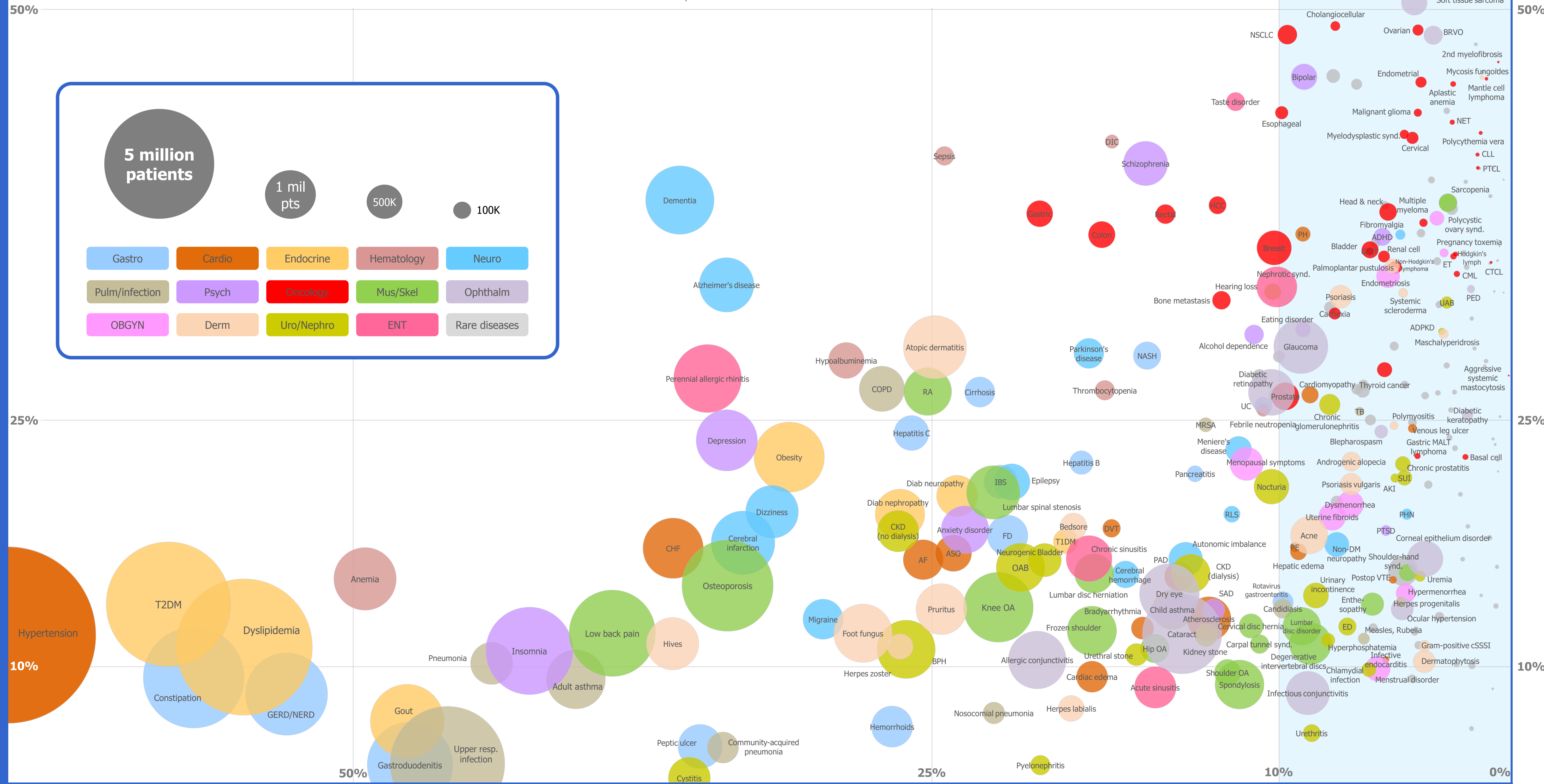
The disease may be rare and intractable* but the needs for new therapies do not necessarily come with that. It will be interesting to look further into the needs level by speciality, expectations for current therapy, and inter-disease perceptions of medical needs to identify vacuums in the market.

* Japan MOH classifies 130 diseases as intractable.

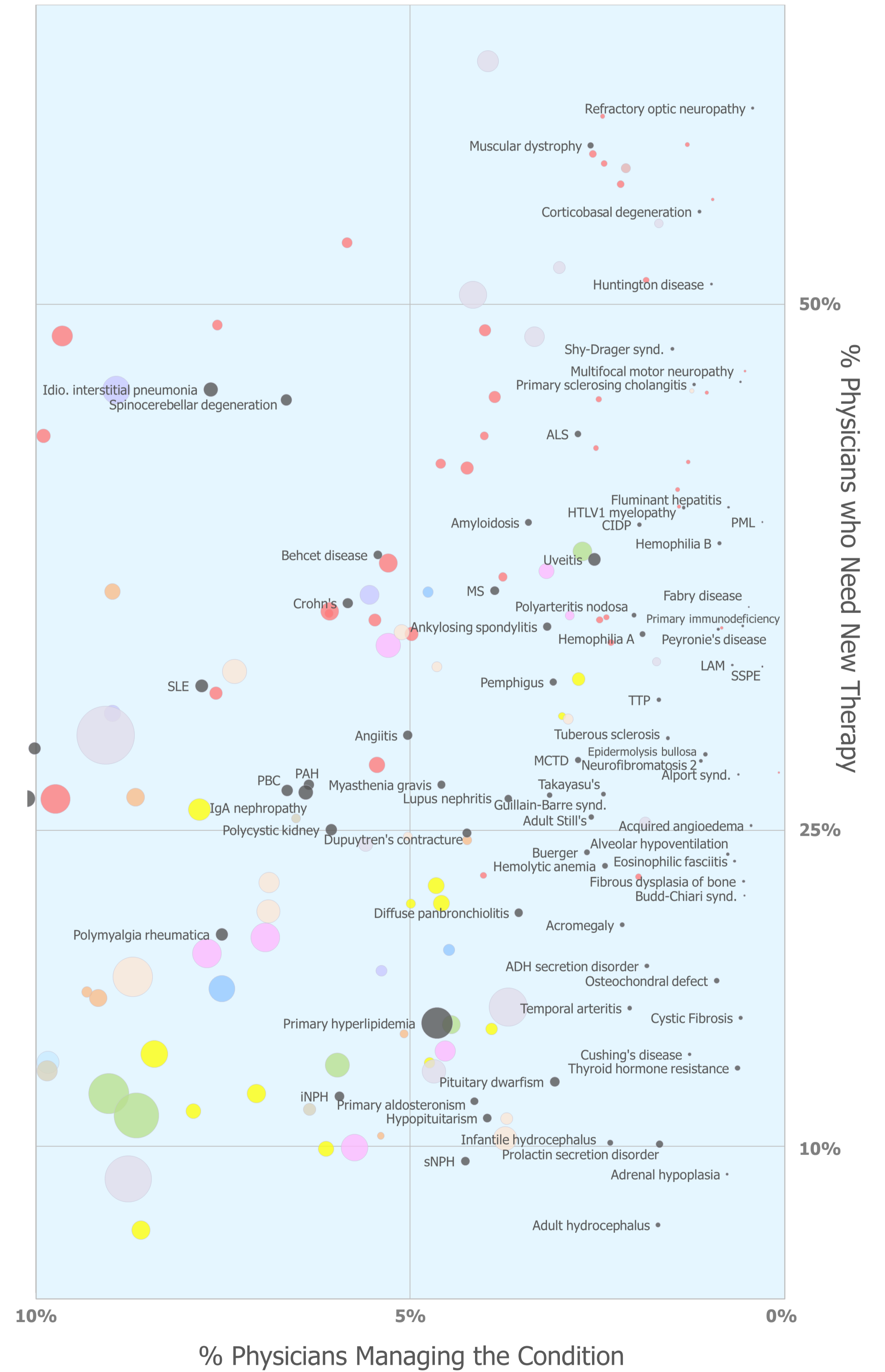
High

Need for New Therapy

Low



What are the grey spots in the main chart?
(Detailed view of the rare diseases)



PatientsMap database describes the patient flow and other aspects e.g. unmet medical needs for 400+ conditions based on an annual web survey with 26,000+ physicians in Japan and the US. PatientsMap project is a joint collaboration of SSRI and m3.