

PRIMARY MARKET INTELLIGENCE



GLP-1 Receptor Agonist Supply Perception Study

Post-Shortage Stabilization Phase:
U.S. Stakeholder Perspectives on Access, Behavior & Outlook

✓ Supply Stabilizing

Study Overview & Supply Availability Ratings



Current scenario reflects post-shortage stabilization



25 Respondents

Structured interviews



10 Physicians

Endocrinologists & PCPs



5 Pharmacists

Retail & specialty

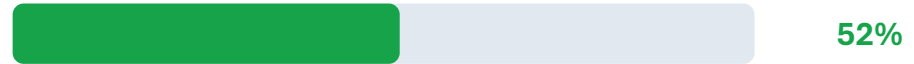


10 Patients

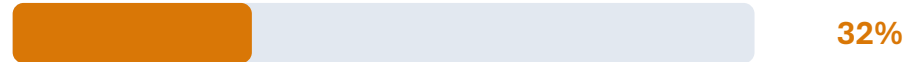
T2D / obesity

How available are GLP-1 therapies?

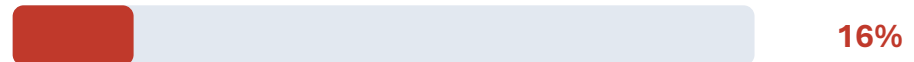
Adequate / consistent



Mostly adequate, occasional gaps

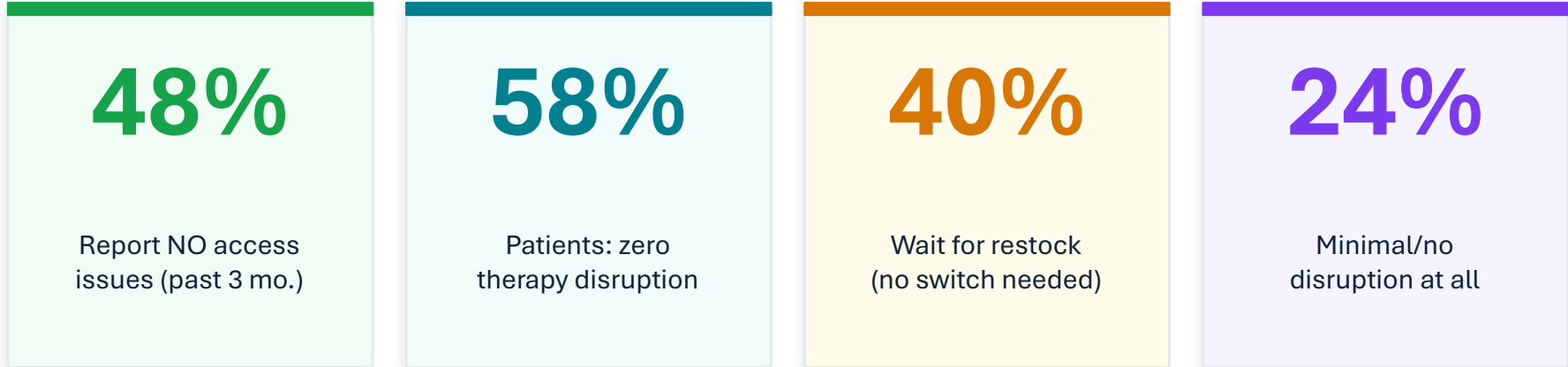


Still limited

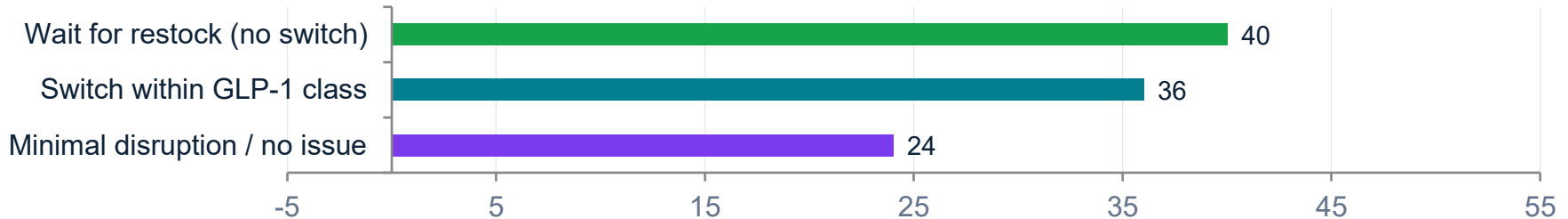


✓ 84% perceive adequate or near-adequate supply — a clear stabilization shift

Access Challenges & Patient Switching Behavior



Response when preferred GLP-1 is unavailable (updated):



Clinical & Distribution Stabilization

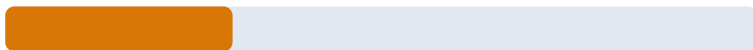
Prescribing is returning to clinical-first decision-making; pharmacy disruptions are now exceptional

Physician Prescribing — Current State

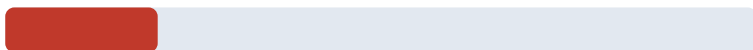
50% No major supply impact now



30% Still consider supply reliability



20% Continue cautious prescribing



Pharmacy Stock-Out Frequency



6-Month Supply Outlook



Key Takeaways & Strategic Implications

Supply Is Largely Normalized

84% perceive adequate or near-adequate availability; gaps are now localized and dose-specific.

Shortage Behavior Has Subsided

Switching pressure down; 40% of patients now wait for restock vs. switching immediately.

Barriers Shift to Cost & Coverage

Primary access hurdle is now payer dynamics (52% cite insurance/prior auth, 44% cite cost).

STRATEGIC IMPLICATIONS

Manufacturers

Shift from crisis management → demand optimization & patient base expansion

Providers

Resume guideline-driven prescribing · Less contingency planning needed

Payers

Increasing role as primary access gatekeepers · Utilization management likely tightening



Thank You

Do you have any questions?

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