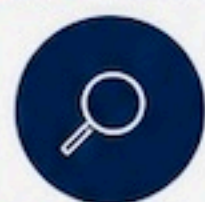


WE KNOW WHAT IS HOLDING OBESITY AND MASH BACK. AND WE KNOW HOW TO MOVE IT.

Across Europe, we have worked to understand how obesity care is shifting, including the growing role of private and out-of-pocket access, and how that changes progression, expectations and behaviour in practice.

We have also interrogated how MASH is identified, staged and managed in real-world settings – revealing the barriers to timely risk assessment, referral and escalation needed to reverse fibrosis before debilitating symptoms take hold.

INSIGHT. STRATEGY. ACTIVATION. IMPACT.



01 | DECODE

Understand what is really happening

We have investigated how obesity and MASH pathways work in practice across European markets, mapping how patients move through reimbursed and private routes, where workflow and ownership break down, and the moments where progression stalls.

Our work has shown where obesity access shifts into self-pay markets, where liver risk is insufficiently assessed, and where delayed staging, referral and follow-up prevent patients from reaching appropriate management in time.

EXPERIENCE INCLUDES:

- Pan-European HCP and patient research
- Mapping reimbursed and private obesity care pathways
- MASH detection, staging and management pathway mapping
- Identification of bottlenecks, drop-off and moments that matter
- Confirmation of the key drivers of behaviour



02 | DESIGN

Identify what needs to change

We have translated pathway insight into practical strategy, defining the priority patient opportunities, the clinical and behavioural triggers for action, and the roles that need to align across primary care, endocrinology, hepatology and obesity services.

This has included clarifying the conditions required for earlier liver risk assessment, more confident staging and referral, and stronger progression in obesity care so the right patients are prioritised and escalated at the right time.

EXPERIENCE INCLUDES:

- Development of actionable priority patient profiles
- Identification of triggers for screening, staging and escalation
- Definition of decision ownership and pathway roles
- Private and out-of-pocket market implications for access strategy
- Strategic recommendations for launch and lifecycle planning



03 | DEPLOY

Create the conditions for action

We have used these insights to shape how organisations should engage before and around launch, focusing activity on the barriers that prevent identification, confidence and progression rather than simply increasing communication.

This has included shaping disease awareness, HCP education and omnichannel planning to improve obesity pathway activation, support MASH recognition and staging, and create the right conditions for adoption and growth momentum.

EXPERIENCE INCLUDES:

- Priority areas for pre-launch engagement
- Omnichannel planning focus
- HCP education and engagement needs
- Disease awareness work to create the right launch conditions

JOINED-UP
THINKING
FOR A HEALTHIER
TOMORROW

FROM PATHWAY FRICTION TO EARLIER ACTION.

Understand where obesity and MASH stall. Define what needs to change. Create the conditions that help the right patients move forward.