

# Biosimilars: US Payer Perspectives (2018)

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## Abstracts

US payers eye European biologics market with envy

Biosimilars may be a roaring success in Europe but the picture in the US couldn't be more different. Once hailed as a solution to stem the tide of soaring drug spending, in the cold light of day, the US biosimilars market has failed to meet expectations. Payers are frustrated. Can the cycle of endless litigation and aggressive commercial tactics be broken? How are payers coping? What do these key stakeholders need to happen next?

Our professional researchers have just interviewed 10 senior level payers, raising the key issues from the last 12 months and revealing their views on potential market evolution.

Is the US biosimilars regulatory framework fit for purpose? How will recent reforms make a difference?

Which events of the last year have hampered the biosimilars market the most—and why?

What more must be done to build critical awareness, understanding and confidence?

To switch or not to switch to biosimilars? What drives non-clinical switching decisions?

Is clinical confidence a real or perceived issue? Is more real-world evidence the answer?

Are payers for or against pharmacy-level substitution?

Will payers assume interchangeability in order to drive better biosimilar adoption rates?

Which utilisation management tactics are used to boost biosimilar use? And should branded products be excluded from formularies?

What is the payers' perspective on the 3 biosimilars currently in use?

How do payers predict future launches will go?

What to expect from this report

Our reports are entirely based on the latest thinking, gathered in the last month (April 2018). You won't find entrenched perceptions, old data and out-of-date opinions. Instead, *Biosimilars: US Payer Perspectives* gives detailed insight into the latest thought processes and actions of senior payers. It's exactly what you need to know.

We identified 18 current issues of most interest to payers now

We explored these via an average of 40 targeted questions put to each payer

Their responses provided 43 unique new insights

Insights are supported by 272 directly quoted comments

Example insight included in *Biosimilars: US Payer Perspectives*

Payers have devised strategies to encourage the adoption of biosimilars. Currently, payers require prior authorisations, and, in the future, they may introduce steps through biosimilars before allowing access to branded originators. In the recent past, large payer organisations have excluded branded drugs from their formularies and adopted biosimilars to encourage biosimilar uptake, a practice that many payers believe will become more challenging to apply as more biosimilars are approved and launched in the US.

## Example quote included in Biosimilars: US Payer Perspectives

'At this point, these [biosimilars] are all on the same tier. They're considered preferred specialty drugs, so other than stepping through first lines of therapy, there is not step therapy through the biosimilar to get to the brand at this point. It will evolve with the real-world data. It will evolve if the interchangeability designation is there. Then it will evolve as the manufacturers and the payers begin to negotiate on the pricing.'

## The expert panel for Biosimilars: US Payer Perspectives

We only interviewed senior payers with current and relevant experience—and all are involved in formulary decisions related to biosimilars (e.g. filgrastim biosimilars [Zarxio], insulin glargine copies [Basaglar] and infliximab biosimilars [Inflectra, Renflexis]).

Medical Director, large national payer

Medical Director, mid-sized national payer

Pharmacy Director, mid-sized payer

Chair, P&T (Pharmacy and Therapeutics Committee), small regional payer

RX Director at a PBM, large national payer

Medical Director, MCO, large national payer

Pharmacy Director, large national payer

Pharmacy Director, large national payer

Medical Director, large national payer

Pharmacy Director, large national payer

## Why buy now?

Poor uptake of biosimilars cannot continue forever. Frustration levels have reached a critical point and the general feeling among payers is that change is not only inevitable,

it can be driven by them too. This report gives you the inside track on the current mood as well as what payers expect will happen next.

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## Contents

### **1. SUBJECT SYNOPSIS**

#### 1.1 Sources

### **2. RESEARCH METHODOLOGY AND OBJECTIVES**

#### 2.1 Methodology

#### 2.2 Objectives

### **3. KEY INSIGHTS SUMMARY**

### **4. ISSUES AND INSIGHTS**

#### 4.1 Current status of the US biosimilars market

##### 4.1.1 Issue summary.

##### 4.1.2 Questions

##### 4.1.3 Key insights

##### 4.1.4 Supporting quotes

##### 4.1.5 Intelligence exhibits

##### 4.1.6 Sources

#### 4.2 Awareness of biosimilars and the need for tailored education

##### 4.2.1 Issue summary

##### 4.2.2 Questions

##### 4.2.3 Key insights

##### 4.2.4 Supporting quotes

##### 4.2.5 Sources

#### 4.3 Communication strategies and focus of education for stakeholders

##### 4.3.1 Issue summary

##### 4.3.2 Questions

##### 4.3.3 Key insights

##### 4.3.4 Supporting quotes

##### 4.3.5 Sources

#### 4.4 The US regulatory framework for biosimilars

##### 4.4.1 Issue summary

##### 4.4.2 Questions

##### 4.4.3 Key insights

##### 4.4.4 Supporting quotes

- 4.4.5 Sources
- 4.6 The evolution, challenges and opportunities with biosimilar switching
  - 4.6.1 Issue summary
  - 4.6.2 Questions
  - 4.6.3 Key insights
  - 4.6.4 Supporting quotes
  - 4.6.5 Sources
- 4.7 Clinical confidence in biosimilars and the role of real-world evidence
  - 4.7.1 Issue summary
  - 4.7.2 Questions
  - 4.7.3 Key insights
  - 4.7.4 Supporting quotes
  - 4.7.5 Sources
- 4.8 Current views on pharmacy-level substitution
  - 4.8.1 Issue summary
  - 4.8.2 Questions
  - 4.8.3 Key insights
  - 4.8.4 Supporting quotes
  - 4.8.5 Sources
- 4.9 Potential impact of interchangeability on adoption of biosimilars
  - 4.9.1 Issue summary
  - 4.9.2 Questions
  - 4.9.3 Key insights
  - 4.9.4 Supporting quotes
  - 4.9.5 Sources
- 4.10 Evolution of payer tactics for adoption of biosimilars
  - 4.10.1 Issue summary
  - 4.10.2 Questions
  - 4.10.3 Key insights
  - 4.10.4 Supporting quotes
  - 4.10.5 Sources
- 4.11 Expected impact of recent regulatory reforms on biosimilar adoption
  - 4.11.1 Issue summary
  - 4.11.2 Questions
  - 4.11.3 Key insights
  - 4.11.4 Supporting quotes
  - 4.11.5 Sources
- 4.12 Experiences and insights into biosimilar launches in the US
  - 4.12.1 Issue summary

- 4.12.2 Questions
- 4.12.3 Key insights
- 4.12.4 Supporting quotes
- 4.12.5 Sources
- 4.13 Future adoption drivers of filgrastim biosimilar
  - 4.13.1 Issue summary
  - 4.13.2 Questions
  - 4.13.3 Key insights
  - 4.13.4 Supporting quotes
  - 4.13.5 Sources
- 4.14 Future adoption drivers of insulin glargine follow-on biologics
  - 4.14.1 Issue summary
  - 4.14.2 Question
  - 4.14.3 Key insights
  - 4.14.4 Supporting quotes
  - 4.14.5 Sources
- 4.15 Future adoption drivers of biosimilars of infliximab in the US
  - 4.15.1 Issue summary
  - 4.15.2 Questions
  - 4.15.3 Key insights
  - 4.15.4 Supporting quotes
  - 4.15.5 Sources
- 4.16 Challenges and opportunities in relation to future anti-TNF biosimilars
  - 4.16.1 Issue summary
  - 4.16.2 Questions
  - 4.16.3 Key insights
  - 4.16.4 Supporting quotes
  - 4.16.5 Sources
- 4.17 Challenges and opportunities in relation to future oncology mAb biosimilars
  - 4.17.1 Issue summary
  - 4.17.2 Questions
  - 4.17.3 Key insights
  - 4.17.4 Supporting quotes
  - 4.17.5 Sources
- 4.18 Impact of reformulated drugs on biosimilar adoption
  - 4.18.1 Issue summary
  - 4.18.2 Questions
  - 4.18.3 Key insights
  - 4.18.4 Supporting quotes

#### 4.18.5 Sources

### 4.19 Future challenges and opportunities in the US biosimilars market

#### 4.19.1 Issue summary

#### 4.19.2 Questions

#### 4.19.3 Key insights

#### 4.19.4 Supporting quotes

#### 4.19.5 Sources



## I would like to order

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