Multiple Sclerosis - KOL Insight and Consensus Outlook Modules

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Abstracts

The multiple sclerosis treatment landscape has undergone dramatic changes over the past year. Biogen's Tecfidera has revolutionised multiple sclerosis treatment in the U.S., eroding significant market share from older therapies. However, patent concerns has stalled Tecfidera's launch in Europe. Genzyme have taken advantage of this delay with Lemtrada's (alemtuzumab) and Aubagio's (teriflunomide) EU approval. The arrival of these drugs is expected to transform multiple sclerosis treatment and be a catalyst for unprecedented market growth.

Over the next five years, the global multiple sclerosis (MS) market is set to grow from $14.3 billion in 2012 to $21.5 billion in 2017. Primary drivers of this growth will be the entry of new pipeline therapies, satisfying the unmet needs of convenient administration and more efficacious therapy, and continued uptake of existing therapies.

A Complete Ongoing Analysis of Current Trends, Future Forecasts and Landscape Modifiers

For instant access to an accurate, unbiased, qualitative review of the latest treatment trends along with a five-year quantitative diabetes market forecast look no further than FirstWord's Therapy Trends: Multiple Sclerosis. This comprehensive FirstWord research is available in two comprehensive modules:

The KOL Insight: Multiple Sclerosis module provides a complete review and is enhanced with exclusive in-depth interviews with leading KOLs from the US and Europe

The Consensus Outlook: Multiple Sclerosis data analysis module provides annual historical and forecast product-level sales data from an average of leading equity

analysts' projections

KOL Insight

Therapy Trends KOL Insight: Multiple Sclerosis analyses the current and predicted key issues, current products and late-stage pipeline products. The report gives you qualitative, inside information from exclusive FirstWord interviews with 12 key opinion leaders (KOLs) through the following:

KOL Insight Report — an in-depth analytical report on diabetes treatment trends

Full report updates — issued to you after each and every significant diabetes market event

Event Bulletins — the latest KOL views in response to each event

Key Report Features and Benefits

Critical insights on products and market developments from leading US and European clinicians

Critical insights on products and market developments from leading US, European and Australian clinicians

Assessment of current leading multiple sclerosis products

Analysis of late-stage pipeline multiple sclerosis therapies

Competitive evaluation of leading players

Current thinking and trends in the treatment of multiple sclerosis

Predicted KOL treatment trends and market leaders

Ongoing FirstWord clinical and market updates

Expert Opinion for Real World Insights

The data and analysis in the report is enriched through the specific insights and opinions of leading clinicians working in multiple sclerosis in the US, Europe and Australia. Their views on specific drugs and treatment pathways provide a unique front line perspective from those working in clinical setting. The results of these detailed and extensive interviews are incorporated though out the text so they can be read in the context of the issue or product being discussed.

KOL Panel

David Hafler, Chief and Chair of Neurology at Yale-New Haven Hospital and Yale School of Medicine, New Haven, Connecticut, US

Professor Douglas Jeffery, MD, PhD, Associate Professor of Neurology, the Department of Neurology, The Multiple Sclerosis and Movement Disorders Centre at Advance Neurology at Cornerstone Health Care Winston-Salem, North Carolina, US

Professor Paul O'Connor, Professor, Division of Neurology, University of Toronto, Toronto, Canada

Professor Lawrence Steinman, Professor of Neurology and Neurological Sciences, Pediatrics, and Genetics, Stanford University School of Medicine, California, US

Professor and Medical Neurologist, MD, and expert in multiple sclerosis at the Ottawa Hospital Research Institute, Ottawa, Canada (requested anonymous)

Professor and Medical Neurologist, MD, and expert in multiple sclerosis at the Mount Sinai School of Medicine, New York, US (requested anonymous)

Dr Mike Bogglid, Staff Specialist Neurologist, Townsville Hospital, University of Queensland, Australia

Dr Patrick Vermersch, Department of Neurology, University of Lille North of France, Hôpital Roger Salengro, Lille, France

Dr Heinz Wiendl, Department of Neurology, Neuroimmunology and Neuro-Oncology, University of Muenster, Muenster, Germany

Dr Martin Wilson. Consultant Neurologist, Walton Centre for Neurology and Neurosurgery NHS Trust, Liverpool, UK

Professor and Medical Neurologist, MD, and expert in multiple sclerosis at Centre Neurologique et de Réadaptation Fonctionnelle, Fraiture-en-Condroz, Belgium (requested anonymous)

Professor and Medical Neurologist, MD, and expert in multiple sclerosis at Heinrich-Heine University, Düsseldorf, Germany (requested anonymous)

Key Quotes from the Report

"I think alemtuzumab is an excellent drug. It's very, very efficacious, and surprisingly well tolerated, considering its potency. They do need some blood monitoring each month but it's actually pretty easy to give and to monitor and certainly very effective." Dr Martin Wilson (Europe)

"Using Lemtrada is different from the other options we have available. It is a real investment in the patient's time. You enter into a contract over five years at least with monthly monitoring. That is something that a lot of patients cannot really foresee when they start such therapies. They need to have a certain insight into the disease and its nature. This is a difference between, let's say, a drug that you rather easily start on and get off, like Tecfidera versus Lemtrada, that is something you start and you don't get off ever." Dr Heinz Wiendl (EU)

"I think teriflunomide is moderately effective. It seems that there are no major severe risks. I would put it in the efficacy range of the current injectables, I don't think it offers an advantage over the currently available first-line drugs, but of course, as a tablet it's more convenient and would hold the promise of increasing adherence" European Key Opinion Leader

KOL Insights - Key Topics

Current multiple sclerosis marketplace

Current treatment landscape

Reimbursement of key multiple sclerosis brands

Unmet needs

Current therapies

Symptomatic treatment

Pipeline therapies

Future developments in multiple sclerosis

Consensus Outlook

Use this detailed report and powerful interactive Excel spreadsheet to compare and contrast companies and products now and in the future. Therapy Trends Consensus Outlook: Multiple Sclerosis includes the following comprehensive resources:

An in-depth 5-year forecast report based on analyst consensus, mapping the impact of future events to predicted product performance

A detailed forecast data analysis spreadsheet model comparing critical market parameters including market size, product sales, market shares and competitive status over the period 2007 to 2017

Timely event-driven market forecast report and data analysis updates over the next 12 months

Report features:

Historical MS sales from 2007–2012

Forecast MS sales from 2013-2017

Key competitors and drug developers

Predicted product positioning

Current and late-stage pipeline drugs

Future event mapping to forecast data points

Comparative clinical trial results

Use Consensus Outlook to:

Chart predicted market growth and product sales

Map your own market parameters

Tailor your strategic and investment focus

Assess your current and future sales resources

Set proactive launches and branding strategies

Analysts compared:

Barclays Capital

Credit Suisse

Deutsche Bank

Goldman & Sachs

International Strategy & Investment

Jefferies

JP Morgan

Merrill Lynch

Morgan & Stanley

Societe Generale

Stifel Nicolaus

UBS

Wells Fargo

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Aubagio (teriflunomide; Sanofi) forecast

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Laquinimod (Teva/Active Biotech) forecast

Daclizumab HYP (Biogen/AbbVie) forecast

Ocrelizumab (Biogen/Roche/Biogen) forecast

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The world of pharma is ever changing and executives must always be up-to-date with the latest developments that could affect their own products, position and research. That is why FirstWord's guarantee to keep Therapy Trends updated offers real commercial advantage.

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Live dispatches and critical industry data

Online opinions from 535,000 vetted physicians

Data from over 125 medical conferences each year

Over 2,000 peer-reviewed medical journals

Over 450 pharmaceutical news sources

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