

Overcoming Market Access Barriers to High Value Drugs

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Abstracts

Overcoming market access barriers to high-value drugs

How can you breakthrough the market access barriers that face high-value oncology and immunotherapy products in the EU5 and US?

Pharma faces unprecedented demands from payers, patients, HTAs and KOLs to prove value and utility for high-cost therapies in key conditions such as Cancer, Multiple Sclerosis, HIV and Rheumatoid Arthritis. Get it wrong, and you won't achieve formulary listing, reimbursement or an optimum price. Further, there is a trend in key markets to empower local decision making, radically increasing the number of stakeholder touch points. In a time of budget constraint, how can companies up their game to meet the growing challenges?

Report Overview

In *Overcoming Market Access Barriers to High-value Drugs* senior industry experts from leading pharma companies address 7 key barriers and propose actionable solutions to ensure market access success. Buy the report now.

Report Features

Unique insights from US and EU experts from companies such as Pfizer, Merck, UCB and Celgene

Case Study: Differentiating CIMZIA from other anti-TNF products to demonstrate

value for patients beyond tender offers

Table: Impact of barriers on prescription and market share of immunology brands

Table: Impact of barriers on prescription and market share of oncology brands

Charts showing the overall impact of market access barriers on prescriptions for Melanoma, Multiple Melanoma, Non-Small Cell Lung Cancer and Renal Cell Carcinoma

Charts showing the overall impact of market access barriers on prescriptions for Psoriasis, HIV, Multiple Sclerosis, and Rheumatoid Arthritis

The challenges for overcoming market access barriers in oncology and immunology

Recommendations for overcoming market access barriers

Key Benefits

Understand how the biosimilar market has grown in 2016 and what are the stand out developments

Investigate national trends driving adoption, pricing and reimbursement of biosimilars.

Examine how biosimilar cost savings are being reinvested in health and the positive impact this is having on payer perceptions

Gain insight into the role of patient groups whose voice is becoming increasingly heard in biosimilars discussions

Assess the current climate for price discounting and why a uniform price reduction is unlikely among EU member states

Review the ongoing arguments for switching from originator to biosimilar products and learn how they differ at the national level

Create communication strategies that challenge misinformation and instill confidence in clinicians and patients

Key Questions Answered By This Report

Value: All stakeholders want value, but what does value mean to each of them?

US/EU5: How do market access barriers differ between the US and EU5?

Cost: Brands being too expensive is the overriding market access barrier. What solutions do experts propose?

Formulary: Not achieving formulary position is a major obstacle impacting prescribing levels and market position – what do you need to do to overcome this barrier?

Localism: What practical actions can you take to understand and meet local stakeholder needs?

Staffing: What capabilities will front line staff need in the future and what are the implications for training and recruitment?

Beyond the Pill: What role can value added services play in gaining market access?

Resourcing: Future market access teams will demand greater resources; how can senior management plan to meet this demand?

Expert Views

Each industry expert has been carefully selected for their practical experience and detailed knowledge of current US/EU5 market access challenges./

Ildar Akhmetov, Consultant, Global Market Access & Pricing (I&I) at Pfizer
Chetak Buaria, Global Head of Commercial Excellence, Merck KGaA

Lee Gervitz, Head of Patient Value Mission for Rheumatoid Arthritis & Women of Childbearing Age, UCB

Alex Grosvenor, Senior Principal, Global Pricing & Market Access at Precision for Value

Michael Kleinrock, Research Director at QuintilesIMS in the US

Mahendra Kumar Rai, Delivery Head - Market Access (HEOR, PRMA, RWE), Tata Consultancy Services

Nicola Redfern, Previously Director of Oncology Market Access at Baxalta and Director of Market Access and Corporate Affairs at Celgene

Chris Martin, Director at InTeg Access Limited

Andrea Passalacqua, Executive Director, Pricing and Market Access, Celgene

Anonymous: Global Market Access Manager at a leading biotechnology company

4 Key Quotes

“The value story for payers and policymakers for your product [is important]. Often, companies have the challenge of not having local data available. They must determine how to work with local stakeholders to build a credible value story for their medicine.”Chetak Buaria, Global Head of Commercial Excellence, Merck KGaA

“Companies also need to design the price as an output of the health economic outcomes research (HEOR) model instead of an input, to position the product for specific patient profiles with the best efficacy results, disease awareness, and advocacy groups.”Anonymous, Global Market Access Manager at a leading biotechnology company

“To address the patient preference aspect of market access barriers, you must develop strong relationships with your patient advocacy groups so that the patients have accurate information available to them about your product from independent sources. There are highly active patient organisations involved in particular cancer types, where

patients are very aware of their disease and its implications. You also need to look at what endpoints are important to patients so that they will get behind you and support, argue for, and champion the access to your product.” Nicola Redfern, Previously Director of Oncology Market Access at Baxalta and Director of Market Access and Corporate Affairs at Celgene

“You want to keep on building on the data and the value that you offer over the course of the product lifecycle. What you need to do is determine how you can work with select KOLs to build incremental data, since not everything will be available when you launch a product.”Chetak Buaria, Global Head of Commercial Excellence, Merck KGaA

Who Would Benefit from This Report?

Market access teams charged with meeting the specific information and data needs of physicians, payers, HTAs and patients

HEOR teams building evidence of value for high-cost therapies

Commercial teams needing to understand market access issues impacting prescribing and availability

MSL teams needing to demonstrate product safety and efficacy with KOLs and patient groups

Post-marketing surveillance teams analysing long-term real-world data to support ongoing use of brands

Teams monitoring competitor activity and identifying opportunity

Senior management and resource planners needing to ensure investment in the market access function and personnel

Content Highlights

Executive summary

Research objectives and methodology

The evolving market access landscape

Evolving pricing and reimbursement rules

Changing customer structure

New appraisal/assessment methods

Understanding specific market access barriers

The cancer and immunology market access landscape

The immunology market access landscape – US and EU5 trends

The top three market access barriers in immunology

Top barrier 1: The medicine is too expensive

Top barrier 2: The medicine is not available on formulary

Top barrier 3: The medicine is only for certain types of patients

The cancer market access landscape - US and EU5 trends

The top three barriers for oncology medicines

Top barrier 1: The brand is too expensive

Top barrier 2: The medicine is not reimbursable

Top barrier 3: Brand is recommended for certain types of patients

Challenges to overcoming market access barriers

Restrictive pricing policies and reimbursement restrictions

Meeting payer needs

Complexity of payer environment

The lack of internal alignment with organisations

Recommendations for overcoming market access barriers

Enhance market access skills and capabilities

Improve data collection to enhance the value story

Intense engagement with patients

Treating stakeholders as partners

Placing greater priority in local access efforts

Key takeaways

Market authorisation and regulatory approval are not assurances of patient access

Market access barriers can be used to a brand's advantage

Build relationships that are stakeholder-centric

Continuing to update and communicate a brand's value story

Skills training for market access teams

Innovative payment and access schemes will be the future of patient access in oncology and immunology

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FirstWord Reports deliver timely, need-to-know intelligence about your products, your competitors and your markets. Covering biosimilars, market access, medical affairs, sales & marketing, technology and therapy areas, FirstWord Reports provide expert views and intelligence on the challenges facing pharma today.

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