



Multiple Sclerosis (EU)

OVERVIEW

The EU multiple sclerosis (MS) market is more dynamic and complex than ever with several clinically distinct disease-modifying therapies (DMTs) currently available, including the recent launch of Merck KGaA's Mavenclad and a potential game-changer entry in 2018 in the form of Roche's Ocrevus, for early primary progressive MS (PPMS) and relapsing forms of MS (RMS). In addition, building on the first generic DMT launch in 2016, the availability of generic glatiramer acetate 40mg in 2018 and generic oral DMTs over the next few years will result in a major future shift in the landscape in the face of increasing payer pressure.

RealTime Dynamix™: Multiple Sclerosis (EU) provides a twice-yearly analysis of key performance metrics, focusing on brand gains and losses, industry contact rates, familiarity and adoption rates of recently launched products, and awareness of products in development. Product perceptions, disease awareness and attitudes, practice management and other topics are rotated throughout the year to provide an ongoing probe of the crucial drivers of change. This ongoing, independent insights series allows marketing professionals to keep abreast of and quickly react to market changes by providing critical information that will support their commercial strategies in the MS space.

SAMPLE & METHODOLOGY

Biannually, ~250 EU neurologists practicing in France, Germany, Italy, Spain, and the UK provide their responses to an online survey. Neurologists meet screening criteria including time in practice, percent of professional time spent in clinical practice (vs. teaching or research), and minimum number of MS patients. Surveys are programmed in the local language.

KEY QUESTIONS ANSWERED

- How is the current and near-term landscape for MS market evolving? How does this differ by country?
- What are the critical opportunities and barriers to growth for each brand and class?
- How is Mavenclad impacting the RMS market?
- How is generic glatiramer acetate faring in the EU markets where available? To what extent is use driven by neurologist choice versus market access pressure?
- How is the treatment algorithm changing with increasing oral DMT experience and expanding options within the monoclonal antibody DMT class?
- To what degree do neurologists have strong preferences for specific brands within the DMT classes? How are the DMTs delivering on the key attributes and on typical patient types?
- With fewer opportunities for personal interactions, what the best channels for industry to share product information with neurologists?
- How often are patients requesting specific DMT brands?
- What are neurologists' perceptions of late-stage pipeline assets and how do they anticipate incorporating these products into their MS treatment? Which DMTs will feel the greatest impact by the launch of Ocrevus?

Products Profiled

Commercial Products

Bayer (Betaferon), Biogen (Avonex, Plegridy, Tecfidera, Tysabri, Zinbryta*), Merck KGaA (Mavenclad*, Rebif), Sanofi (Aubagio, Lemtrada*), Novartis (Gilenya, Extavia), Roche (Ocrevus*, MabThera), Teva (Copaxone), multiple companies (i.e., rituximab*, Synthon's glatiramer acetate*)

*May still be pending/reimbursement pricing in certain EU markets at time of fielding

Pipeline Agents

AB Science (masitinib), Biogen [opicinumab, ALKS 8700 (with Alkermes)], Celgene/Receptos (ozanimod), J&J/Actelion (ponesimod), MedDay (MD-1003), Novartis (siponimod, ofatumumab), TG Therapeutics (ublituximab)

Key Dates

- Q1 March
- Q3 October

Note: a three day embargo is placed on delivery to non-manufacturers allowing clients time to digest the findings before public dissemination

Deliverables

- PowerPoint report
- Frequency table & summary statistics
- On-site presentation
- Proprietary questions (for purchasers of the annual series)

Related Reports 2018

- RealWorld Dynamix™: DMT Switching in Multiple Sclerosis EU
- RealWorld Dynamix™: DMT New Starts in Multiple Sclerosis EU
- RealTime Dynamix™: Multiple Sclerosis US