Physicians WILL PRESCRIBE BIOSIMILARS

Trending now: Lower patient costs remain a key driver across five specialties with significant biologic use.

IN A SURVEY from InCrowd, targeted U.S. biologics prescribers shared their perceptions regarding the onset of biosimilars — lower cost, similar yet not identical versions of already FDA-approved biologic drugs. Data suggest that efficacy and safety considerations notwithstanding, U.S. physician respondents are poised to embrace biosimilars as a potentially important way to reduce patient drug costs.


Dr. Diane Hayes

Nearly half of U.S. doctors in five major specialty areas surveyed — physicians with significant biologics prescribing patterns — anticipate expanding their prescribing of biosimilars in the next three years, as biosimilar availability increases. Respondents ranked lower costs for patients as the chief way biosimilars could bring value to their patients. Reflecting practical considerations, one in four doctors said that payers and insurance firms ultimately will determine — if not mandate — their level of biosimilar prescribing over the next three years.

"As the healthcare industry grapples with the best strategies to lower drug costs, the survey shows that while understandably prioritizing efficacy and safety first, physicians are on board with their use," says Diane Hayes, Ph.D., president and co-founder of InCrowd. "The key will lie in how payers decide to reimburse for biosimilars and their biologic counterparts."

Promise of Immuno-Oncology Therapies Is Boosting R&D Funding and Alliances

Investments in research and development for new immuno-oncology drugs, along with dramatic improvements in complete response rates in trials for new immuno-oncology therapies, are helping to increase the number of alliances between pharmaceutical and biotech companies and university and cancer centers, a new analysis by the Tufts Center for the Study of Drug Development shows.

Currently, more than 130 biotech and 20 pharmaceutical companies are developing I/O therapies, according to Tufts CSDD. That activity, Tufts CSDD said, reflects — and is fueling — worldwide immuno-oncology product sales, with annual revenue expected to reach $25 billion to $40 billion by 2020, up from $2.5 billion in 2015.

The number of immuno-oncology alliances between pharma/big biotech and small enterprises grew at a torrid pace, from six in 2013 to 58 in 2015, accounting for $39 billion in research commitments over the three years.

"The immuno-oncology era is off to a promising start," says Ronald Evens, adjunct research professor at Tufts CSDD at Tufts University School of Medicine, who conducted the analysis. "The question is whether research partners can surmount what could be substantial obstacles to further clinical and commercial success."

Those challenges, according to Mr. Evens, include developers identifying validated biomarkers to increase the likelihood of clinical success and reduce development time and cost; the growing difficulty of recruiting enough volunteers for clinical trials; and cost-benefit metrics payers may adopt to guide reimbursement, which could limit market access and possibly returns to investors.

Four Trends in Pharmerging Markets

Technavio's latest report on the pharmerging markets provides an analysis on the most important trends expected to impact the market outlook from 2016-2020.

- Strategic alliances: Forming strategic alliances for licensing and collaboration help in the co-development and commercialization of drugs and ensure the in-flow of adequate funds from both companies and help to reduce liability costs for individual companies in case of failures. They also attract more venture investments. Big pharmaceutical companies, to retain their presence in pharmerging markets, increasingly adopt partnership activities with local vendors for the development of new products, especially generic drugs.
- Increase in generic sales: Pharmerging countries mostly include developing or less-developed countries where the affordability of drugs plays a major role for the blossoming of the market. Hence, the utilization and sale of generic drugs are high. Though the sales of generics have slowed down, the sales still outpace the sales of originator molecules.
- Mergers and acquisitions: Mergers and acquisitions help to generate better revenue and develop advanced drugs. Co-development and commercialization rights for the drugs also make sales easier. The acquisition of a local company helps pharmaceutical companies to strengthen their presence in these markets
- Early drug launches in pharmerging markets: The changing healthcare landscape drives pharmaceutical companies to adapt a strategy of launching their products in pharmerging markets as well as in mature markets. Pharmerging markets hold huge potential for new launches, as initiatives are being taken by local governments to increase the reimbursement coverage for individuals and drugs.

Doctors Adopt Electronic Prescribing to Combat Prescription Fraud and Abuse

New data from Surescripts, a leading health information network, shows that more than 48,000 providers in New York have adopted technology to combat prescription fraud and abuse and improve patient care.

Since March 1, the number of New York providers enabled for electronic prescribing of controlled substances (EPCS) increased 28%, as the state moved closer to the March 27 deadline to comply with the Internet System for Tracking Over Prescribing (I-STOP) mandate that requires the use of electronic prescribing.

Doctors in New York are outpacing their counterparts in other states, with just 8% of providers enabled for EPCS nationwide compared with 47% in New York.

This is a significant improvement compared with one year ago, when fewer than 2% of providers in New York were ready.

Therapeutic trax

CNS

The global CNS biomarker market is projected to reach $5.1 billion by 2020 from $3.1 billion in 2015, reflecting a five-year CAGR of 10.4%. Key market drivers include the increase in public-private partnerships with government support, pressure to keep healthcare costs down, a growing elderly population, and the rapid advancement of genomic and proteomic technologies. The discovery segment of the CNS biomarker market will exhibit modest growth during the next five years, partly because many of the proteins involved in the major CNS disease pathways have been discovered.

Source: BCC Research

The Parkinson's disease market is set to expand from $2.1 billion in 2014 to $3.2 billion by 2021, at a moderate CAGR of 5.7%, but the need for a cure will remain. This market growth will occur despite the patent expiries of several key products during the forecast period, including Azilect, Neupro, and Stalevo.

Source: GBI Research

The treatment market for bipolar disorder is set to decrease from $5.8 billion in 2014 to $4.2 billion by 2024, at a negative CAGR of 3.2%, as generic erosion deters the development of novel therapies. This decline, which will occur across the eight major markets of the US, France, Germany, Italy, Spain, the UK, Japan, and Canada, is going to be steep between 2015 and 2017.

Source: GlobalData

Kidney Disease

The global market for erythropoietin stimulating agents (ESAS) will grow from about $7.2 billion in 2015 to $7.3 billion by 2020. The global erythropoietin biologics drug market has been growing in terms of value for the past 15 years in pace with the increasing prevalence of chronic kidney diseases throughout the world; however, the market is expected to see a decline in the forecast period due to expiry of major patented drugs in the U.S. and European markets, and due to the entrance of biosimilar erythropoietin drugs in the European market since 2008.

Source: BCC Research

Ophthalmic Conditions

The global ophthalmic drugs market is expected to reach $21.6 billion by 2018, expanding at a CAGR of 5.2% between 2013 and 2018. The worldwide ophthalmic drugs market stood at $16 billion in 2012.

The rising prevalence of eye disorders worldwide has impelled the global healthcare industry to fuel research and development endeavors. It has also catapulted the global ophthalmic drugs market to the forefront of the industry.

Source: Transparency Market Research

Respiratory Diseases

The cystic fibrosis market had a market value of more than $695 million in 2012 and is anticipated to rise drastically over the future period in the major eight developed countries and will surpass $4.0 billion by 2019, for a CAGR of more than 30%. Original treatment with disease-modifying mechanism of action is the main feature increasing the growth of the market in terms of value. The constructive effect of the market's new applicant will counteract the effects of major patent failures throughout the estimated period.

Source: Radiant Insights

Meanwhile, pharmacy adoption of the technology is nearly universal, with 95% of pharmacies in New York enabled to receive prescriptions for controlled substances electronically.

"The industry has made remarkable progress in adopting this critical technology that can have a direct and immediate impact on improving patient care and saving lives," says Tom Skelton, CEO of Surescripts. "As we look beyond New York, we will continue to expand the connections we have with software vendors, providers and pharmacies to broaden the utilization of e-prescribing for controlled substances and add considerable value to the nation's healthcare system."

Medication Adherence Market to Grow

The global medication adherence market is expected to grow with 17.5% CAGR during the 2016-to-2022 time period, due to growing demand for advanced medication adherence systems, and growing geriatric population, according to P&S Market Research.

The increasing demand of mobile health (mHealth) technologies and increasing demand of personalized healthcare technologies will also drive the growth of the global medication adherence market. Among the various product offerings, the software-only offering segment is expected to witness the fastest growth during the forecast period.

The restraints associated with the growth of the global medication adherence market include privacy and security issues in the EHR and e-prescribing based medication adherence; and inadequate healthcare infrastructure in developing economies.

Geographically, North America dominated the global market of medication adherence market in 2015; whereas the Asian market is expected to witness the fastest growth at a during the forecast period.

Oncology Corner...

News and updates around cancer-related R&D, trends, services, and products.

Cancer Moonshot Update

Cancer is perceived by American adults to be more serious than any other disease or health condition by a four-fold margin; cancer is also the second-leading cause of death in the nation. The magnitude of attention that cancer holds could account for why more than eight in 10 (83%) Americans' support a 20% or greater increase in cancer research funding — in line with that of the National Cancer Moonshot initiative, proposed by President Obama this year, according to a new STAT-Harvard poll.

According to the poll, 46% said the funding increase is about right, while 37% said it's not enough. Backing for the effort is bipartisan, with 90% of Democrats and 79% of Republicans supporting at least a 20% boost in cancer research spending.

The poll, by STAT and the Harvard T.H. Chan School of Public Health, found that two-thirds of Americans think cancer treatments are more successful than they were 10 years ago at allowing people to live longer with a good quality of life.


Greg Simon

In other news about the Cancer Moonshot, Vice President Joseph Biden has appointed a corporate executive to lead the cancer initiative. Greg Simon, 64, who has been named executive director, is battling cancer himself. In June 2014, Mr. Simon received a diagnosis of chronic lymphocytic leukemia.

In 2003, he helped start FasterCures, a charity intended to speed the translation between basic research and lifesaving medicines. In 2009, Mr. Simon left FasterCures to become senior VP for patient engagement at Pfizer. He left Pfizer in 2012, and has been working since then as the chief executive of Poliwogg, a financial services company focused on investing in life sciences.

Negative Provider Experiences with Oncology Manufacturers Affect Value

The oncology industry severely lags behind other industries in the customer experience that manufacturers deliver. In fact, 80% of the oncology manufacturers studied earned negative "net promoter scores" from physicians, according to a recent survey by ZS.

ZS's first Customer Experience Tracker found companies with low net promoter scores struggle to gain access to physicians. Reps from those companies were seen by 63% of oncologists they targeted — and could not meet with 37% — while reps from companies with high net promoter scores met with 93% of oncologists they targeted. Further, 39% of healthcare respondents exchanged emails with their highest-rated company, compared with only 16% who corresponded with their lowest-rated company.


Maria Whitman

ZS concluded that by enhancing customer experience, oncology companies can significantly boost their impact in today's highly competitive oncology market. In fact, ZS estimates oncology companies could add $50 million to $75 million in incremental sales for every $1 billion in current sales.

"For oncology manufacturers with multibillion-dollar portfolios, an evolved customer experience that meets the needs of providers and patients can create incremental opportunity equivalent to the launch of a small new product," says ZS Managing Principal Maria Whitman.

Precision for Medicine to Acquire ACT Oncology


Chad Clark

Precision for Medicine, part of the Precision Medicine Group, has agreed to acquire ACT Oncology, a CRO specializing in the field of oncology. ACT Oncology's capabilities complement and expand Precision for Medicine's strengths in biomarker-driven, precision drug development.

Precision for Medicine provides biomarker research and expertise in genomics, bio-informatics, assay development, specialty lab services, global specimen logistics, and companion diagnostics. Together, Precision for Medicine and ACT Oncology create a fully integrated precision oncology clinical development solution, combining clinical trial management with advanced biomarker capabilities and processes.

"The acquisition of ACT Oncology represents a unique opportunity to provide our clients a completely novel solution to advance oncology research," says Chad Clark, president, Precision for Medicine.

Janssen Licenses Potential Prostate Cancer Therapy

Johnson & Johnson is investing $50 million in Tesaro and is licensing a potential prostate cancer treatment from the pharmaceutical company. Johnson's Janssen Biotech will develop and commercialize Tesaro's niraparib for treatment of prostate cancer. Niraparib is an oral, once-daily treatment that is currently in late-stage clinical trials for use in ovarian and breast cancer.

As part of the niraparib pact, Janssen is paying Tesaro an upfront fee of $35 million and could pay up to $415 million in milestone payments if certain development, regulatory and commercial milestones are reached, the companies said in a news release.

Janssen also will fund all development and commercialization activities for the use of niraparib in prostate cancer.

Cancer Trax

Total sales for the head and neck squamous cell carcinoma (HNSCC) markets in the seven major markets, will increase from $386 million in 2014 to $1.53 billion in 2024. The recent surge in investment in HNSCC has resulted in a diverse and innovative pipeline. Because it is an area with high unmet need and little competition, pharmaceutical companies of varying sizes are attempting to capture their own share of this potentially lucrative market.

Source: GlobalData

The global cancer diagnostics market is estimated to grow from $100.9 billion in 2013 to $168.6 billion by 2020, a CAGR of 7.60%. The global cancer diagnostics market is driven by growing prevalence of different forms of cancer, rising cancer awareness, support of government initiatives and funding, and increase in healthcare expenditure.

The introduction of non-invasive screening methods and novel diagnostic biomarkers are anticipated to create new revenue streams and boost the cancer diagnostics market over the next five years.

Source: Transparency Market Research PV

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