

# MARKET REPORT



Physician Views – Which multiple sclerosis players do the best marketing job? – FirstWord polls neurologists in the US and 5EU

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## Scope

The multiple sclerosis market has undergone notable change over the past 2 years, primarily due to the launch of the first oral therapies (Novartis' Gilenya, Sanofi's Aubagio and Biogen Idec's Tecfidera). These products – Tecfidera in particular – have provided a new level of dynamism and helped to drive US volume growth for the first time in 2 years (with revenue expansion since 2011 reportedly driven exclusively by price increases) - see Spotlight On: Biogen Idec's Tecfidera – the story so far...and where next for the drug launch of the year?

The availability of these treatments is expected to drive a major shift away from older injectable brands such as Biogen Idec's Avonex, Bayer's Betaseron, Teva's Copaxone and Merck KGaA's Rebif (known collectively as the ABCRs), which for many years were positioned as the gold standard therapies of choice - see Physician Views Poll Results – Neurologists indicate rapid uptake by year end for Biogen Idec's Tecfidera, boosted by warehousing effect and clean label and Physician Views Poll Results – Biogen Idec's Tecfidera poised to assume share from ABCRs and orals; fully-acquired Tysabri to act as support with growing first-line presence expected.

Emergence of efficacious and more convenient oral drugs, alongside the launch and availability of other treatment options that may provide a better 'therapeutic fit' for patients with more severe forms of MS (such Biogen Idec's Tysabri and Sanofi's Lemtrada) and the ability to stratify patients (JCV testing) have also made for an increasingly competitive market.

Furthermore, given the revenues attached to the ABCR brands, the retention of market share and the launch of more conveniently dosed versions (applicable in both the cases of Avonex and Copaxone) are strategies that are high on the agenda of the companies that promote these brands. The added convenience of oral therapies that are deemed to be as efficacious as injectables is expected to expand the overall MS market; however, the legacy of older brands among the treating physician base will remain a key strength.

In addition, competition within the emerging oral segment retains an intriguing dynamic given the stronger-than-expected launch of Tecfidera in the US. This poses the risk of stagnation to the Gilenya and Aubagio brands, note analysts, which Novartis and Sanofi will no doubt do their best to rectify.

since the launch of Tecfidera, with new treatment decisions increasing from 15 percent to 24 percent of total prescriptions as switching between medications doubles and 33 percent more treatment naïve patients initiate therapy as a proportion of total prescriptions."

This change in dynamic is reflected in a return to growth for the MS class, with total prescriptions growing 4 percent year-on-year, note Barclays analysts – positive news for Novartis and Sanofi, although continued strong growth for Tecfidera over the summer months suggests that market share pressure from Biogen Idec's drug will remain intensive.

Prior to the launch of Tecfidera, the MS market in the US had not delivered growth in total prescription volumes since early 2011, note analysts at Barclays, with revenue growth driven exclusively by aggressive price increases. Whether further price inflation is sustainable in the post-Tecfidera market remains unclear. However, additional pressure is likely in the form of generic Copaxone potentially from 2015, while Gilenya will lose US patent exclusivity in mid-2019 - see Physician Views Poll Results – Generic Copaxone may struggle to gain market share in light of Teva's new formulation and oral switching trends.

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