

MARKET REPORT



Physician Views: The great generic Advair opportunity – a physician perspective

BioPortfolio
Life Science Healthcare and
Pharmaceutical
Market Research and
Corporate Data



Physician Views: The great generic Advair opportunity – a physician perspective

BioPortfolio has been marketing business and market research reports from selected publishers for over fifteen years. BioPortfolio offers a personal service to our customers with dedicated research managers who will work with you to source the best report for your needs. Based in the UK, BioPortfolio is well positioned to coordinate our customers' orders sourced from over 50 global report publishers.

We are pleased to present details of this report to assist your buying decision and administrative process. You will find easy-to-use *How To Buy* information on the last page of this document.

We look forward to being of service to you.

If you have bulk and/or recurring requirements, please get in touch - we can liaise with publishers to obtain sample pages and negotiate discounts on your behalf.

Phone: +44 (0)1300 321501 or **Email:** reportstore@bioportfolio.com

Physician Views: The great generic Advair opportunity – a physician perspective

Scope

As illustrated here – see FirstWord Lists: Leading respiratory drugs 2012 and 2018 – the respiratory market is poised to evolve considerably over the next five to 10 years.

There remains, however, some ambiguity around one of the key dynamics in the asthma/chronic obstructive pulmonary disease (COPD) market, which concerns the commercial profile of GlaxoSmithKline's \$8 billion a year Advair franchise.

The FDA recently published draft guidance that appears to have lowered regulatory barriers for substitutable generic versions of the drug (see Spotlight On: FDA shifts landscape for generic respiratory products – is GlaxoSmithKline's \$8 billion Seretide/Advair franchise in the firing line?).

This in turn has prompted some speculation that the first AB-rated generic version of GlaxoSmithKline's product could reach the market by 2016. Confirming its own development efforts last week, Teva suggested that such a timeline is overly optimistic; the Israeli company expects to be the first player to file a substitutable generic in 2017, which could facilitate a 2018 approval and launch - see ViewPoints: Teva makes u-turn in generic Advair chase, but can it catch rivals?

As and when a generic version of Advair is launched in the US will prove integral to how the broader asthma/COPD market develops. The longer that it takes to approve such a product, for example, provides GlaxoSmithKline a greater window of opportunity to switch patients to its new once-daily ICS/LABA combination Breo Ellipta or potentially its LAMA/LABA combination Anoro Ellipta, which could secure FDA approval by the end of 2013.

A previous Physician Views poll run by FirstWord suggests that enthusiasm for a once-daily ICS/LABA combination is relatively high among pulmonologists. Respondents (n=43) indicated that they would use Breo in around 40 percent of patients whom they would typically treat with Advair.

However, they also believe that payers will be restrictive in their use of Breo, given that once-daily dosing is

perceived to be its primary advantage versus Advair. This assessment appears to have gained some currency with the recent confirmation that Express Scripts will exclude Breo from its formulary listing in 2014, and becomes the second pharmacy benefits manager to do so (after CVS Caremark) - see Physician Views Poll Results - US Pulmonologists keen for Breo Ellipta - can payers be convinced?

This suggests that from a payer perspective, there will potentially be momentum to support use of generic Advair. Furthermore, this may actually intensify (among patients retained on Advair) if physicians are keen to switch some patients to Breo; pulmonologists polled by FirstWord suggested that around a third of patients treated with twice-daily ICS/LABA therapies fail to comply with the dosing schedule.

Therefore key questions focus on how pulmonologists would expect to use a substitutable generic version of Advair if such a drug was available, and how patients would react to using an alternative product to GlaxoSmithKlines established and familiar brand and inhaler device.

Purchase Reasons

This week's Physician Views poll asks pulmonologists and general practitioners based in the US and 5EU markets (where a substitutable generic version of Advair is also yet to launch):

What their main reason would be for not prescribing a generic version of Advair if available?Additional Details

Publisher : FirstWord Pharma

Reference :

Number of Pages : 0

Report Format : PDF

Publisher Information :

FirstWord

BioPortfolio
Life Science Healthcare and Pharmaceutical
Market Research and
Corporate Data

**Best Prices
Guaranteed**

bioportfolio.co.uk

BioPortfolio
Life Science Healthcare and Pharmaceutical
Global Market Research and Corporate Data

How to Buy...Physician Views: The great generic Advair opportunity – a physician perspective **Option 1 - Online**

Go to our website and pay online with any major debit or credit card:

<https://www.bioportfolio.co.uk/product/71>

Option 2 - Request a Proforma Invoice

Fill in the details below, and either **Scan** this page **and email** it to us at reportstore@bioportfolio.com or **Fax** it to us at +44 (0)1305 791844. We will send you a Proforma Invoice and deliver your report on settlement.

Your Name:

Job Title:

Your Email:

Your Contact Phone:

Company Name:

Address:

Post/Zip Code:

Country:

P.O. Number:

Any Other Instructions:

Pricing Options: (please tick one)

- \$695** | Single User Price
- \$1395** | Global License Price

Payment Options: (please tick one)

- Online Credit Card** (we will email you the invoice with a payment link)
- Direct Wire Transfer** (we will email you the invoice with our bank details)

Authorising Signature:

Option 3 - Phone Us on +44 (0)1300 321501

We will be delighted to give you our personal attention.