



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 Roche's Ocrevus, for early primary progressive MS (PPMS) and relapsing forms of MS (RMS), and Merck KGaA's Mavenclad, an oral induction therapy for RMS. An active late-stage DMT pipeline holds the promise of a 2019 launch of Novartis' Mayzent with a first-to-market secondary progressive MS (SPMS) label. Evolving practice guidelines recommend early treatment with high efficacy DMTs in highly active MS patients although neurologists' beliefs and prescribing patterns do not appear to always be in sync.

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 are newcomers, Mavenclad and Ocrevus, impacting the RMS market? With continued market penetration, where are neurologists using Ocrevus in the RMS treatment algorithm? Is Mavenclad perceived and used as a first-line option? Has Ocrevus grown the PPMS market segment?
- To what extent is generic glatiramer acetate 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?
- What are neurologists' perceptions of late-stage pipeline assets and how do they anticipate incorporating these products into their MS treatment?
- To what degree will the availability of Mayzent expand the SPMS segments or increase the switch rate during SPMS transition? What treatment patterns will differ between active versus not active SPMS patients?

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*, glatiramer acetate*)

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

Pipeline Agents

AB Science (masitinib), Biogen [diroximel fumarate (with Alkermes)], Celgene (ozanimod), J&J/Actelion (ponesimod), MedDay (MD-1003), MediciNova (ibudilast), Novartis (Mayzent*, ofatumumab), TG Therapeutics (ublituximab)

*Could move to commercial products based upon regulatory outcomes

Key Dates

- Q1 April
- 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

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