



Multiple Sclerosis (Canada)

OVERVIEW

The multiple sclerosis (MS) market in Canada 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), EMD Serono's Mavenclad, an oral induction therapy for RMS, and generic glatiramer acetate agents. 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 (Canada) 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, ~50 Canadian neurologists practicing in, but not limited to, Quebec, Ontario, and British Columbia 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.

KEY QUESTIONS ANSWERED

- How is the current and near-term landscape for the MS market evolving? How does this differ by province?
- What are the critical opportunities and barriers to growth for each brand and class?
- How is the treatment algorithm changing with increasing oral DMT experience and expanding options within the monoclonal antibody DMT 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 RMS option? Has Ocrevus grown the PPMS market segment?
- How is the availability of generic glatiramer acetate impacting the market? To what extent is use driven by neurologist choice versus payer mandate?
- 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 (Betaseron), Biogen (Avonex, Plegridy, Tecfidera, Tysabri), EMD Serono (Mavenclad, Rebif), Novartis (Gilenya, Extavia), Pendopharm (Glatect), Roche (Ocrevus, Rituxan), Sanofi (Aubagio, Lemtrada), Teva (Copaxone)

Pipeline Agents

AB Science (masitinib), Biogen [opicinumab, Vumerity* (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

- Q2 May
- Q4 November

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

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