Biosimilars Advisory Service: Physician Perspectives on Biologics in Rheumatology and Gastroenterology | US/EU5/Japan | 2015

Biologics prescribed by rheumatologists and gastroenterologists are among the most commercially successful biopharmaceutical products in the world. These biologics are a prime target for biosimilar developers. In February 2015, EU5 rheumatologists and gastroenterologists gained access to the first biosimilar licensed for use in their specialties, and we forecast that over the coming decade the immune biosimilar space will grow rapidly as further biosimilars are approved in Europe, the United States, and Japan. For biosimilar marketers looking to secure a foothold in this future market, understanding the perceptions and expectations of these specialists with regard to biosimilars is paramount. We conducted primary market research with rheumatologists and gastroenterologists in the United States and Europe to understand their perspectives on biosimilars and their expected adoption rates. Based on our extensive market research, this report also provides highly granular brand and biosimilar market forecasts for the United States, Europe, and Japan.

Questions Answered in This Report:

- The prescribing decisions that rheumatologists and gastroenterologists make will be fundamental to the uptake of biosimilars; key factors that will drive their decisions are their comfort and familiarity with biosimilars and their level of concern about similarity to the originator product. How similar do physicians think biosimilars are to the reference product?

- Two biosimilar infliximab brands, Remsima and Inflectra, were approved and available in Europe at the time of this research. What patient share has biosimilar infliximab captured in rheumatic and IBD disease? What concerns do rheumatologists and gastroenterologists have regarding biosimilars?

- Developers of immune biosimilars are conducting clinical trials largely in RA or psoriasis, relying on indication extrapolation for licensing in IBD. What opinions do physicians have on indication extrapolation, and do gastroenterologists in particular intend to prescribe in extrapolated indications?

- With multiple biosimilar developers targeting the same reference brand biologic, the need for a biosimilar developer to positively differentiate its biosimilar will be a key requirement in order to appeal to prescribers and capture patient share in this competitive market place. How will
physicians weigh different factors when choosing between multiple biosimilars of the same reference brand?

Scope:
Markets covered: United States, EU5, and Japan.
Primary research: Quantitative 45-minute online survey of 99 rheumatologists and 95 gastroenterologists from the United States, France, and Germany.

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