Small molecule therapies offer specific targeting of the aberrant cellular signaling that underlies a certain cancer, without the nonspecific and often less tolerable effects of chemotherapy treatments. However, uptake of targeted therapies in Mexico and Brazil is highly dependent on incorporation into publically funded formularies which vary widely between countries, in terms of drugs and indications covered. As multiple marketed and late-stage emerging agents seek to optimize the market access opportunities offered, this report assesses how the rising cost of targeted medicine is balanced with clinical need in non-small-cell lung cancer (NSCLC), renal cell carcinoma (RCC) and hepatocellular carcinoma (HCC).

Questions Answered in This Report:

- Determine the current market access environment for small molecule targeted therapies for NSCLC, RCC and HCC: What public and private healthcare coverage is available in Brazil and Mexico for small molecule targeted therapies for NSCLC, RCC, and HCC? How does it vary between countries? What are the current drivers and barriers to prescribing small molecule targeted therapies in oncology, and what are the main cost-related/clinical constraints to the uptake of these premium-priced agents? How do national and/or institutional healthcare authorities regulate the prescribing of small molecule inhibitors for NSCLC, RCC, and HCC?

- Assess physician and payer attitudes toward small molecule inhibitors: Why do oncologists prefer one of two competing, small molecule targeted therapies for NSCLC and RCC? How do surveyed oncologists anticipate prescribing of small molecules for NSCLC, RCC, and HCC will evolve by 2018? Which therapies for NSCLC, RCC, and HCC do payers expect to receive approval and coverage in the public and private sectors? What types of risk-sharing and/or patient assistance programs will encourage wider coverage of small molecule targeted therapies for NSCLC, RCC, and HCC, and prescribing of one agent versus another? How do payers expect access to key targeted therapies to evolve in the next three years? Are government initiatives underway to expand patient access?

- Explore the outlook for emerging agents: What clinical benefits do oncologists and payers seek in emerging therapies for NSCLC, RCC, and HCC? What types of savings on direct and indirect costs do payers seek in an emerging therapy for NSCLC, RCC, and HCC? What role will head-to-
head and pharmacoeconomic outcomes play in differentiating the reimbursement of high-cost targeted therapies versus currently available targeted therapies? What market access levers can drug developers take advantage of to optimize positioning of their new products for these cancers in Brazil and Mexico?

**Scope:**

This Emerging Markets Physician & Payer Forum report entitled *Current and Emerging Small Molecule Targeted Agents in Key Oncology Indications: Securing Market Share and Payer Acceptance in Increasingly Crowded and Segmented Markets in Brazil and Mexico* explores the dynamics affecting prescribing of key targeted drugs in the cost-controlled climate and the primary challenges facing emerging therapies aspiring to significantly penetrate this multifarious market segment.

Markets covered: Brazil and Mexico.

Primary research: This report draws on insights from 50 surveyed medical oncologists and 6 interviewed payers. Interviewees were required to be influential in determining patient access to key small molecule inhibitors used in the treatment of HCC, RCC and NSCLC at the institutional or regional/national level and came from the following backgrounds:

- Brazil: Pharmacy specialist with oversight of Hospital das Clínicas’ (HC) pharmaceutical assistance programs and member of the P&T committee at the HC of the University of São Paulo (USP); Member of the pharmacy and therapeutics (P&T) committee and supply center service at INCA (Instituto Nacional do Cancer) in Rio de Janeiro; Managing medical auditor of a major HMO based in São Paulo.

- Mexico: Coordinator of clinical practice guidelines and new drug inclusions at CENETEC-Salud; Evaluator of new oncology drugs and their efficacy in patients at IMSS and member of the Mexican Oncology Society; Medical director at ISSSTE’s “20th of November” National Medical Center with oversight of the purchase of medicines and formulary inclusion at ISSSTE.

**Report Details**

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