Opioid Addiction (Market Access Dynamics in Opioid Addiction) | Physician & Payer Forum | EU5 | 2015

Nearly 800,000 individuals were diagnosed with opioid addiction in the five major European markets in 2014. The treatment strategy for patients with opioid addiction consists of a combination of opioid substitution therapy and psychosocial programs, and it is not uncommon for patients to linger on methadone or high-dose buprenorphine products for years—effectively replacing one addiction with another. Indivior Pharmaceuticals’ (formerly Reckitt-Benckiser’s) Suboxone is the only opioid substitution product in Europe with remaining market exclusivity, although generic entrants in 2016 could improve market access to this formulation and shift prescribing trends away from opioid substitution therapies with greater abuse liability. Additionally, a long-acting depot injection of buprenorphine, if successfully developed, may offer lower administrative costs and improved patient compliance compared with formulations that are dosed once daily.

Questions Answered in This Report:

• Gain physician and payer perspectives on current and evolving prescribing trends. How do prescribing patterns for opioid addiction vary across the EU5 (France, Germany, Italy, Spain, and the United Kingdom)? What drugs are preferred first-line for the treatment of opioid addiction? What have been the main constraints to Suboxone’s uptake?

• Understand the mechanisms by which opioid addiction therapies are reimbursed in the EU5. Suboxone, the last remaining opioid addiction product with market exclusivity in the EU5, is considerably more expensive than other opioid substitution products, which have been on the market for many years and are all generically available. How does reimbursement of opioid addiction therapies vary among the EU5 countries? To what extent will the patient share for opioid addiction therapies shift when generic versions of Suboxone launch in the EU5 starting in 2016? To what extent does the cost of Suboxone currently prevent access to this drug in the increasingly price-sensitive EU5 markets?

• Explore physician and payer attitudes toward emerging opioid addiction medications. Which clinical attributes are the most persuasive in influencing physician prescribing decisions and payer reimbursement decisions for opioid addiction therapies? What are the most important unmet needs remaining in the treatment of opioid addiction, according to surveyed psychiatrists? How will a long-acting depot injection of buprenorphine, if successfully
developed, be received by psychiatrists and payers?

Scope:
Decision Resources' European Physician & Payer Forum report, “Market Access Dynamics in Opioid Addiction: Probing Prescriber Preferences and Payer Strategies for Current and Emerging Agents in the EU5” explores the many international, national, and local market access factors that can influence the utilization of opioid addiction therapies, particularly in response to increasingly challenging health technology assessments and more complex pricing and reimbursement negotiations. This report draws on insights from 253 surveyed psychiatrists in the EU5 and from interviews with 15 European payers, all of whom have influence at a national or regional level.

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