The Metastatic Castrate-Resistant Prostate Cancer Patient Journey: EU5 Prescribing Preferences and Payer Strategy as Options Diversify

Three new premium-priced therapies—Xtandi (Medivation/Astellas Pharma), Provenge (Dendreon), and Xofigo (Algeta/Bayer HealthCare)—have recently been approved in Europe for prostate cancer. These agents will join existing costly therapeutics Jevtana (Sanofi) and Zytiga (Janssen), driving the metastatic castrate-resistant prostate cancer (mCRPC) market in Europe to become increasingly crowded and competitive. Therefore, as therapies seek to optimize their place in medical practice and the EU5 markets strive to tighten their healthcare belt, payers and prescribers must balance tightening budgets and evolving cost-containment policies with clinical need. Drawing on insights from 250 surveyed medical oncologists across the EU5, 30 surveyed urologists in Germany only, and 15 interviewed payers, this report, The Metastatic Castrate-Resistant Prostate Cancer Patient Journey: EU5 Prescribing Preferences and Payer Strategy as Options Diversify, explores the evolving reimbursement and market access landscape for mCRPC, the dynamics affecting prescribing of key drugs in an increasingly cost-constrained climate, and the main challenges facing emerging therapies’ uptake in this heterogeneous market.

Questions Answered in This Report:

• What role do key brands play in the treatment of mCRPC in the EU5, and how do prescribing patterns vary by country?

• How do European product labelling and/or local, regional, or institutional prescribing restrictions differentially impact use of key brands in mCRPC?

• What have been the main clinical as well as budgetary/reimbursement constraints to the uptake of the novel orally available hormonal agents compared with IV-administered agents, across the lines of treatment, and how do such constraints impact sequencing of available treatments?

• How will medical oncologists (and urologists in Germany) embrace new entrants Xtandi, Provenge, and Xofigo?

• How does reimbursement of approved mCRPC therapies vary between countries? How do national, regional, and local healthcare authorities regulate the prescribing of these agents?
- How are increasingly convoluted health technology assessments and pricing and reimbursement processes in the EU5 impacting patient access to these new market entrants?

- How might evolving healthcare reforms and cost-containment strategies affect reimbursement of novel agents, and to what degree will prescribing constraints present a future hurdle for emerging therapies in the EU5?

- What market access levers can drug developers take advantage of to better position new mCRPC products in the EU5?

Scope:

Decision Resources Group’s European Physician & Payer Forum report The Metastatic Castrate-Resistant Prostate Cancer Patient Journey: EU5 Prescribing Preferences and Payer Strategy as Options Diversify, explores reimbursement and additional payer policies that influence prescribing trends for approved drugs for prostate cancer. The report assesses levers and barriers that will promote or restrict market access for premium-priced agents across the cost-constrained EU5.

Markets covered: France, Germany, Italy, Spain, United Kingdom.

Primary research: Online survey of 280 physicians, interviews with 15 European payers.

Interviewed payers include the following:

- France: Hospital formulary committee member, hospital pharmacy director, advisor for the CT, and advisor to HAS.

- Germany: Director of market access and pharmaeconomics, advisor to the GBA, drug specialist member of the regional drug commission, and hospital pharmacy director.

- Italy: PTOR-PTO member, AIFA advisor and PTOR-PTO member, ex-AIFA member and current AIFA advisor.

- Spain: Hospital pharmacy director, regional formulary committee member, member of regional pharmacy commission, and DGPPS.

- United Kingdom: Clinical commissioning group (CCG) member, hospital formulary committee member, and head of medicines management committee.

Report Details

- Pub Date: November 2014
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