

# A Quantitative Assessment of Reimbursement and Existing Price Levels for Multiple Myeloma Patients Across US, EU, CA & Emerging Markets

Walsh K. <sup>1</sup>, Sykes E. <sup>1</sup>, Al-Zubeidi S. <sup>1</sup>, Jiang J. <sup>3</sup>, Makwana A. <sup>4</sup>

Clarivate Commercial Strategy Consulting, Global Market Access & Pricing, London UK<sup>1</sup>, Clarivate Commercial Strategy Consulting, Global Pricing and Market Access, Washington D.C., USA,<sup>2</sup> Clarivate Commercial Strategy Consulting, US Market Access & Pricing, New York City, USA<sup>3</sup>

## Introduction:

- Multiple Myeloma (MM) is the second most common hematological malignancy, **with an estimated 192,000 diagnosed cases of in 2020<sup>1</sup>**
- As a largely age-related disorder, **both the incidence and prevalence of MM are expected to increase**, the World Economic Forum estimates 185,000 new diagnoses in 2030<sup>2</sup>.
- Typical treatment is **characterized by complex array of combination treatments, usually combining three or more individually expensive therapies**
- There are significant access, reimbursement and pricing inequities for MM drugs across the globe
- To tackle rising and unaffordable drug prices, **industry must move towards a more equitable value-based pricing model** and there needs to be **greater access to generics and biosimilars in emerging markets** to increase competition and drive prices down

## Results:

Table 1: Cost of commonly available MM drug combinations by Country\*

	VRd	VTD	DaraPd	DaraRd	DaraVMP	PomVd
Bahrain	\$273,277	n/a	\$461,373	\$474,517	\$245,263	\$260,133
Brazil	\$136,957	\$30,633	n/a	n/a	n/a	n/a
Canada	\$267,527	\$52,239	\$142,232	\$231,199	\$67,001	\$178,559
Czech Republic	\$172,691	\$40,941	\$335,357	\$288,519	\$198,056	\$219,529
Finland	\$165,119	\$58,629	\$397,143	\$340,434	\$259,522	\$221,828
France	\$47,578	\$18,198	\$251,442	\$165,940	\$134,480	\$133,080
Germany	\$84,099	\$62,522	\$288,059	\$169,749	\$169,480	\$202,410
Greece	\$98,552	\$40,873	\$316,030	\$213,246	\$162,954	\$201,337
Hungary	\$61,805	\$25,047	\$296,627	\$178,258	\$154,230	\$180,174
Italy	\$175,595	\$61,458	\$359,141	\$273,160	\$196,231	\$261,577
Japan	\$267,503	\$179,686	\$202,917	\$209,025	\$278,099	\$261,395
Lebanon	\$168,361	\$42,652	\$298,878	\$299,969	n/a	\$167,271
Morocco	\$813,379	\$360,426	n/a	\$512,018	\$301,361	n/a
Namibia	\$21,962	\$27,430	n/a	n/a	n/a	n/a
Oman	\$122,437	n/a	n/a	\$316,542	\$324,160	n/a
Poland	\$234,642	n/a	\$341,172	\$382,603	\$162,066	\$193,211
Russia	\$91,765	n/a	n/a	\$197,623	\$138,224	n/a
Saudi Arabia	\$163,296	n/a	\$306,496	\$263,604	\$169,758	\$206,188
Slovak Republic	\$85,529	\$39,239	\$255,960	\$217,793	n/a	\$123,696
South Africa	\$168,734	n/a	\$361,721	\$264,119	n/a	\$266,366
Spain	\$130,205	n/a	\$360,914	\$347,446	n/a	\$143,673
Tunisia	\$145,338	n/a	n/a	n/a	\$254,789	n/a
United Kingdom	\$194,792	\$39,729	\$348,616	\$304,695	\$158,584	\$238,713
United States	\$617,667	\$172,891	\$708,854	\$821,596	\$245,573	\$504,925
<b>Average price of EU 5</b>	<b>\$133,649</b>	<b>\$41,275</b>	<b>\$317,854</b>	<b>\$246,041</b>	<b>\$176,296</b>	

\*Prices per patient per first year of treatment, prices highlighted in pink demonstrate where countries are paying more than the average prices paid by EU 5

- Consistently our results (Table 1) show that **MM treatment combinations in Emerging Markets such as South Africa, Tunisia, Morocco, Bahrain and Lebanon are priced more highly** than the average price across EU 5 countries
- Limited access to generics and biosimilars may be driving the high prices seen in markets such as Morocco and Bahrain**
- Access to and uptake of new innovative drugs such as ixazomib, isatuximab, selinexor and carfilzomib is minimal in markets outside of Europe, Canada and the US. **This is limiting drug combinations and treatment options for patients in emerging markets**
- Pricing inequities experienced at the individual drug level is exacerbating pricing inequities for combination treatments as a whole, with emerging markets disproportionately affected
- Drugs which gained low benefit assessment rating at EU HTAs failed to gain public funded access in emerging markets**

## Methodology:

- Secondary desk research was used to analyze the pricing, Health Technology Assessments (HTA's) and regulatory environment across 24 markets, evaluating 12 innovative and generic Multiple Myeloma pricing across drugs and combinations across 24 global markets
- Pricing analysis was benchmarked against average prices for EU 5 and affordability and tiered pricing principles
- HTA's and the wider regulatory environment was used to benchmark access between Emerging and Mature markets
- Wider policy analysis of potential policy implications to improve patient access to Multiple Myeloma drugs across Emerging Markets was discussed post analysis with experts via interviews.

Table 2: HTA decisions across leading EU markets vs. uptake across Emerging Markets

Drug V	France	Germany	Italy	Spain	UK	EM uptake
bortezomib	Reimbursed (ASMR III)	Reimbursed	Reimbursed with restrictions	Reimbursed	Reimbursed	Moderate
carilzomib	Reimbursed with restrictions (ASMR IV)	Reimbursed	Reimbursed with restrictions	Reimbursed	Reimbursed	Minimal
daratumumab	Reimbursed with restrictions (ASMR IV)	Reimbursed	Reimbursed with restrictions	Reimbursed	Reimbursed	Moderate
dexamethasone	Reimbursed (ASMR V)	Reimbursed	Reimbursed	Reimbursed	Reimbursed	Moderate
elotuzumab	Not reimbursed	Reimbursed	Reimbursed with restrictions	Not reimbursed	Reimbursed	Minimal
isatuximab	Reimbursed (ASMR IV)	Reimbursed	Reimbursed	Reimbursed	Reimbursed	Minimal
ixazomib	Reimbursed (ASMR V)	Reimbursed	Reimbursed with restrictions	Not reimbursed	Reimbursed	Minimal
lenalidomide	Reimbursed (ASMR III)	Reimbursed	Reimbursed with restrictions	Reimbursed	Reimbursed	Moderate
melfhalan	Reimbursed	Reimbursed	Reimbursed	Reimbursed	Reimbursed	Moderate
pomalidomide	Reimbursed (ASMR V)	Reimbursed	Reimbursed with restrictions	Reimbursed	Reimbursed	Moderate
prednisone	Reimbursed	Reimbursed	Reimbursed	Reimbursed	Reimbursed	Moderate
thalidomide	Reimbursed (ASMR V)	Reimbursed	Reimbursed	Reimbursed	Reimbursed	Minimal

## Conclusions

- Pricing and access inequities are exacerbated in MM due to multi-drug combination therapies that are administered over a prolonged period
- Inability to access one individual drug can prevent access to multiple combinations**, with patients in emerging markets facing limited options compared to their European counterparts
- A lack of generics and biosimilars in emerging markets may be resulting in disproportionate use of expensive branded products** compared to US, CA and European markets. Further research should be undertaken to understand how this may be driving the high prices seen in emerging markets such as Morocco and Bahrain
- A push towards **more innovative and flexible pricing models, including value-based pricing, should be explored if Industry is to live up to ATMI goals and CSR aspirations.**

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