

Analysis of pharmaceutical company actions in Asia-Pacific to improve patient access

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Introduction

While significant progress has been made in expanding healthcare access across Asia over the past decade, a persistent gap remains in funding innovative treatments. Low public reimbursement rates and high costs of new medicines in emerging markets limit patient access.¹ Pharmaceutical companies play a unique role in addressing this challenge by developing innovative partnerships to improve affordability and accessibility, tailored to the specific needs of these markets. This research aims to explore pharmaceutical companies' efforts in enhancing access to treatment in a limited public reimbursement environment in select emerging Asia-Pacific (APAC) markets through innovative collaborations and initiatives with non-public or private partners.

Objectives

The objective of this research is to examine cases of pharmaceutical company actions by way of access partnerships in six emerging markets in Asia-Pacific to:

1. Identify the therapeutic areas where companies are most actively working to address funding and access gaps for innovative medicines.
2. Determine the key stakeholders and partners that pharmaceutical companies are collaborating with to address these challenges.
3. Examine the nature of the solutions being implemented to bridge the funding and access gaps.

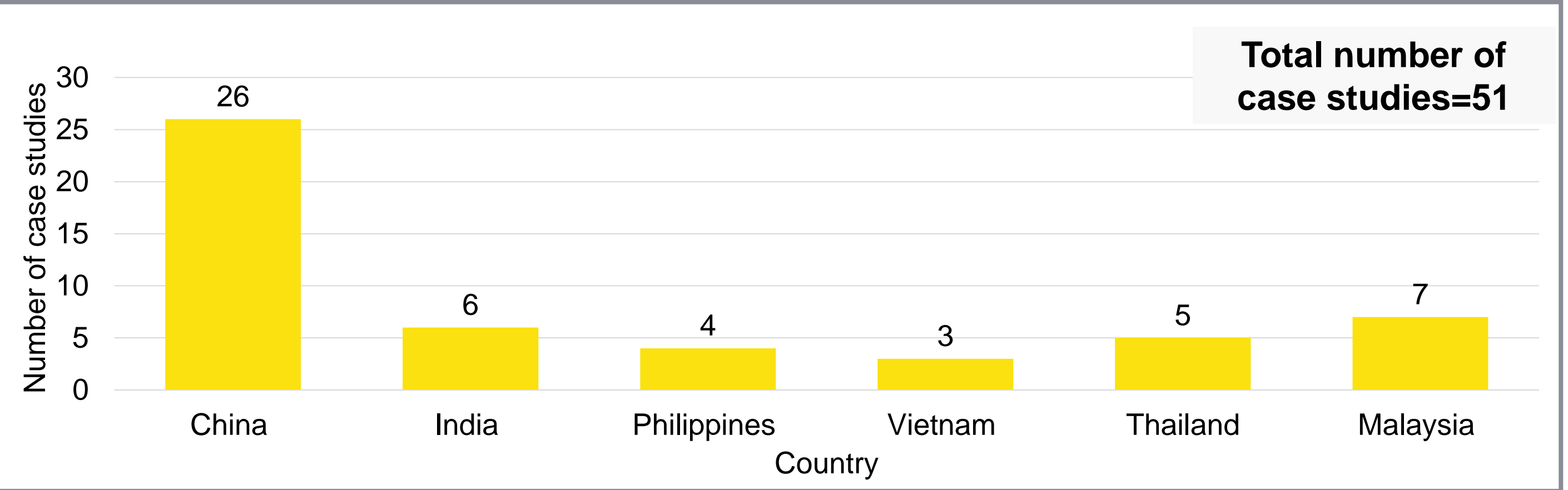
Methods

This study analyzes data collected solely from publicly available sources. These include company websites, manufacturer association websites, websites of non-governmental organizations, and news releases by companies. The period of analysis is limited to past 10 years wherein only cases with date of implementation 2014 onwards were included in scope. Only cases pertaining to identifiable originator drug(s) post launch where partnership involved a minimum of one non-government stakeholder were included. The analysis covers the following markets: China, India, Malaysia, Thailand, Philippines, and Vietnam. Where it is reported that an initiative applies to a region, it is assumed that the initiative is available in all countries in that region unless stated otherwise. Drug donation programs were excluded from the study.

Results

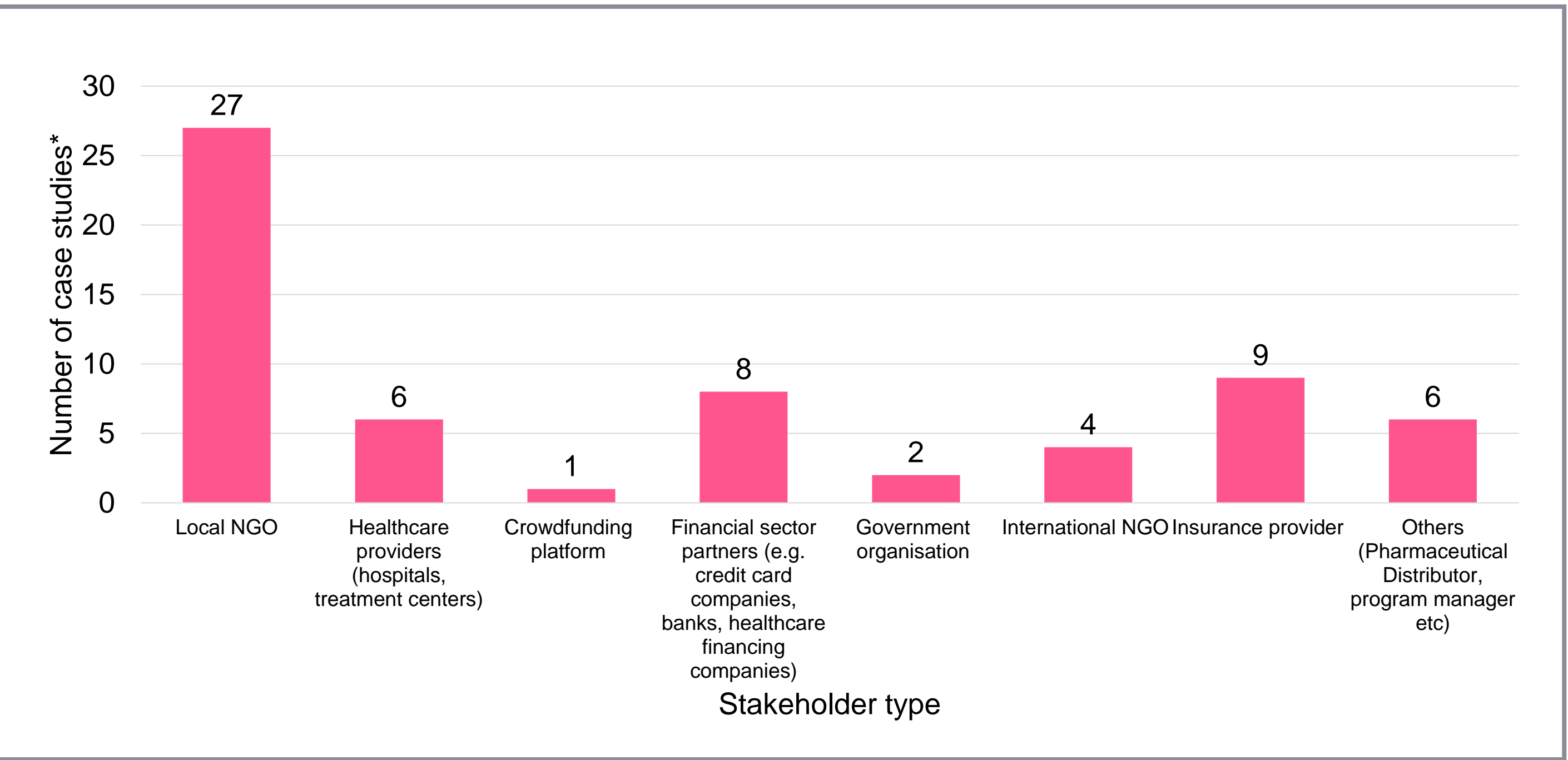
Our research found 21 pharmaceutical companies engaged in 51 access partnerships pertaining to the funding of medicines. More initiatives are being implemented in China (n=26) than any other country in scope (Figure 1).

Figure 1: Number of alternative financing case studies by country



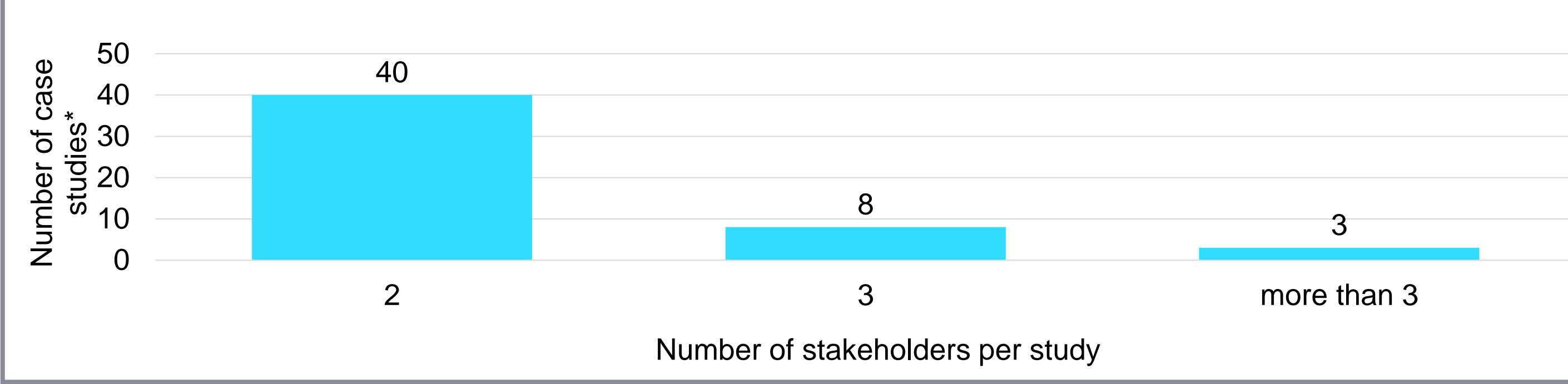
Among the stakeholders, local non-governmental organizations (NGOs) stood out as the most engaged partner (27 out of 51), followed by insurance providers (9 out of 51) (Figure 2). Eleven initiatives involved multiple partners (more than 2) (Figure 3).

Figure 2: Types of stakeholders reflected across cases identified



* Total number of stakeholders does not equal the number of access partnerships as each access partnership can have more than two stakeholders (pharmaceutical manufacturers included).

Figure 3: Number of stakeholders per case study (including pharmaceutical manufacturers)



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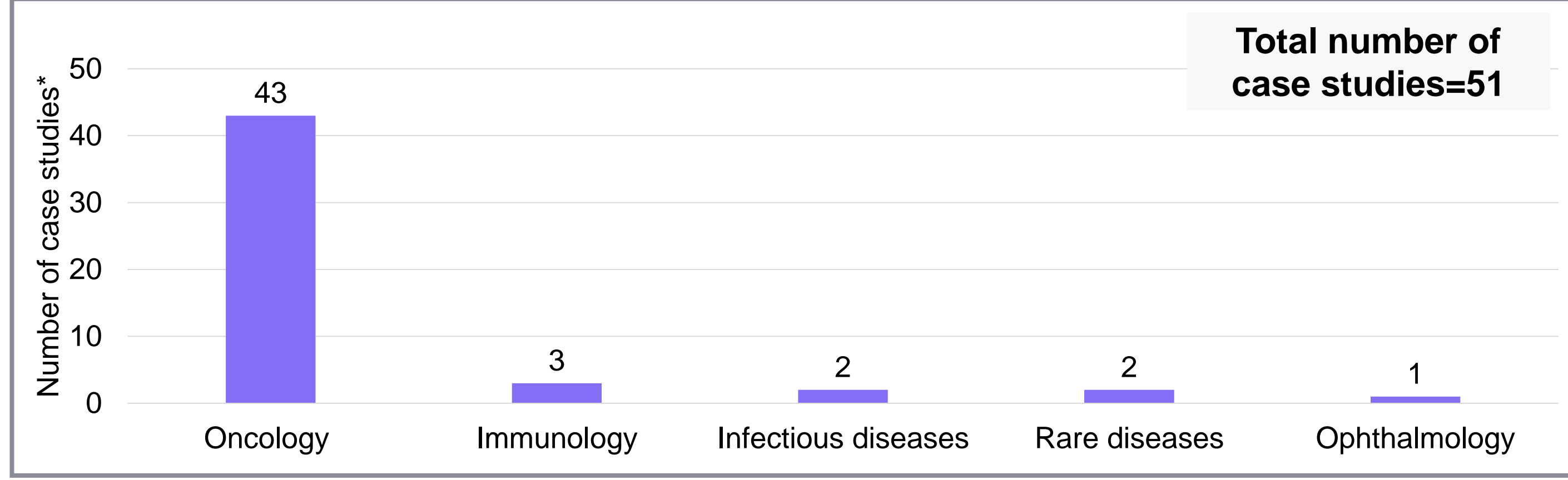
Traditional patient support programs offering discounted goods still play a dominant role in healthcare funding in APAC and accounted for the highest proportion of pricing actions (27 out of 51) by pharmaceutical companies, followed by non-subsidized funding (6 out of 51). Some access initiatives did stand out by adopting innovative financing techniques, addressing areas beyond affordability, such as outcomes-based agreements (3 out of 51) and deferred payment plans (4 out of 51) (Figure 4).

Figure 4: Type of affordability mechanism used for each case study



An overwhelming majority of initiatives identified focus on oncology (Figure 5). Notably, the lack of partnerships was identified for initiatives that focus on chronic conditions.

Figure 5: Number of case studies per disease area



* Total number of case studies across all disease areas does not equal the number of case studies as there are studies involving medications from more than one disease area.

Due to the limitations of publicly available data, it was not possible to assess the impact of these initiatives on patient access. To accurately evaluate the success or failure of innovative access programs, it is essential to strengthen and standardize the reporting of performance indicators associated with these initiatives. Nevertheless, the growing number of initiatives over the decade highlights the importance of access partnerships towards creating a comprehensive market access strategy in emerging markets.

Conclusions

Pharmaceutical companies play a pivotal role in improving patient care across various therapeutic areas by forming strategic partnerships that address the entire care continuum. While oncology has been a primary focus of innovative access initiatives, non-communicable diseases (NCDs) pose a growing global health challenge, accounting for a significant portion of mortality. According to the World Health Organization, NCDs account for 41 million deaths annually, while oncology accounts for approximately 9.6 million deaths.^{2,3} Given the disproportionate burden of NCDs, including chronic illnesses, there is an urgent need for collaborative action. By partnering with stakeholders and considering regional factors, unmet needs, and policy dynamics, pharmaceutical companies can contribute to addressing a wide range of diseases where innovative access initiatives are essential.

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