Barbec(U)’d Oncology Market Access:

How BBQ pulled pork is similar to European P&R negotiations

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Introduction:

• The market to gaining authorisation: Southern style, barbecued pulled pork are very similar to European market access procedures. Small economies must be used like a BBQ tool to cut and cut until everything, becomes with the products must be kept really low or no so it does not stick to the meat.

• In a current European pricing and access landscape for oncology products, it is crucial for companies to be aware of the implications of a Southern BBQ coalition against restraints to market access.

• While the approach is working very well for EU payers, and BBQ lovers, one should set along our approach for a Southern style ponction.

Methods:

• Investigate market access design created by lengthy strategy and reimbursement negotiations (in France, Spain and Germany).

• Review lessons of market access policies compared to the US, and the subtle differences to access for specific subpopulations.

• Collected the data of initial price publication in each market, EU uptake customer order submission, and price point at launch (France, Italy, Spain and Germany).

• Targeted the length of the price negotiation and compared price level access to markets well aware the US and United States.

• The research was done in order to find out more, go to www.simonscu.ch.

Results: Lesson #1 – EU Market Access is slow, slow, slow

• Negotiating a national agreement for reimbursement in France, Italy and Spain typically takes between 1 and 2 years, but there is no recognizable trend for this (see graph 1).

• Negotiating a national reimbursement for the first time is the most significant drawback in the EU4. The products EUA approved in 2011 have yet to get a national reimbursement in other EU4, France, Italy and Spain.

• On the other hand, this situation has an upside as most of these products also received a rating of 5 or 6.

• The research did not examine the UK as there is no national negotiating body.

• Results: Lesson #2 – Oncology pricing in the EU is low, low, low:

• The average EU rebate for oncology products is 30% of the price at the time of first EU agreement by an average of 30%-40% exchange rate as of EU agreement.

• The average EU payers price at EU agreement is 35% lower than their US price (see graph 2).

• Note that the analysis only looks at published prices (not known discount in Germany, Italy and Spain) at EUA approval date. EUA also disclose regulations for additional confidential discounts bringing net prices even lower than reported.

• Some argue that the style of Southern BBQ started as a way to make low price, inferiorly cut-of meat that the consumer could eat for free andMEU players are now following suit.

• In addition, the conclusion was that most new products also received a rating of 1 to 6 at least one subgroup, allowing the manufacturer to move forward with the negotiation process.

• In France, there are also few examples, of differential evaluation by subgroups such as 1 (very good) and 6 (not at all common in Germany at all).

• Conclusion:

• With slow negotiations, low price potential, and limited patient population, EU markets are not as rewarding. The implications of this should be noted.

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