

ORIGINATOR AND GENERIC MARKET ACCESS PROTECTION STRATEGIES IN GERMANY USING DERMATOLOGY AS AN EXAMPLE

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Background

In dermatology, the galenic of vehicles makes it difficult to substitute medicines and hence aut idem is rarely used. In 1998, Solaraze[®] was approved as originator with active substance diclofenac sodium and developed soon as market leader for treatment of actinic keratosis. The first generic product Solacutan[®] entered the German market on 15 September 2016. Objective of this analysis is to investigate the effect of market entry of the generic product Solacutan[®] and further generics on market share between these products and corresponding price development in Germany.

Methods

German prescription data for both Solaraze[®] and Solacutan[®] between May 2015 and September 2018 were extracted from IMS Pharmascope. Prices for the period May 2015 to October 2018 were extracted from LAUER-TAXE[®]. Market share was calculated based on all SHI prescriptions (any pack size) and price in the respective period was specified for the largest pack size. Total market size refers to market size of all products with active substance diclofenac sodium for treatment of actinic keratosis.

Results

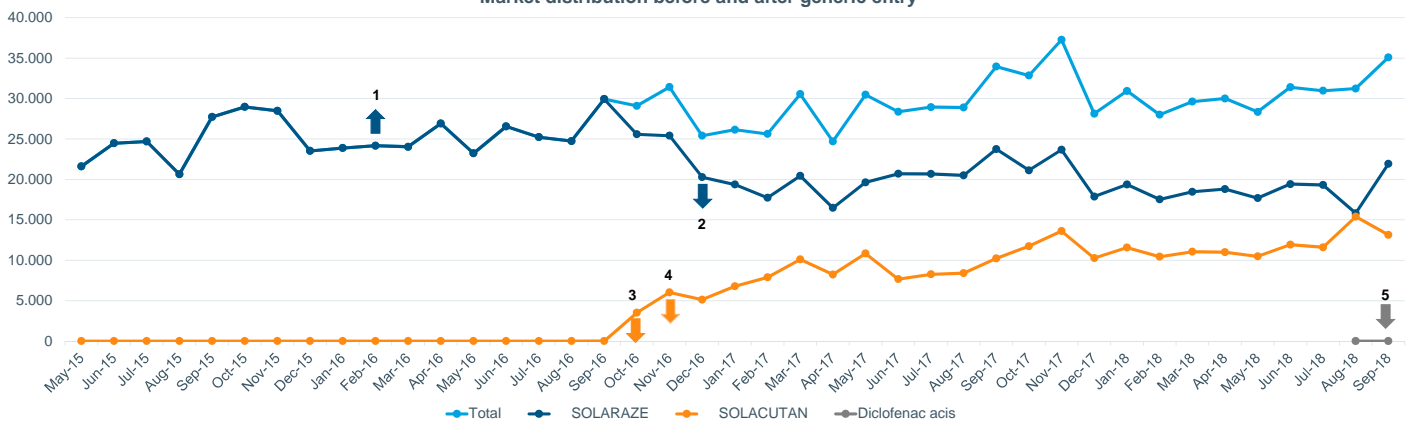
The generic Solacutan[®] entered the market with the same price level as the original product Solaraze[®] in September 2016 (i. e. 131.61 € for Solacutan and 131.65 € for Solaraze[®]). In October 2016 the price of Solacutan[®] was lowered by 15 % (to 111.50 €) and lowered by additional 6 % (to 104.40 €) in November 2016. In December 2016, the price of Solaraze[®] was lowered by 10 % (to 118.45 €). Two months after the price counteraction, Solaraze[®] had a market share of approximately 69 % (correspondingly, Solacutan[®] had a market share of 31 %) which has been approximately stable since. Since August 2018 three additional generics entered the market with the Solacutan price, Diclofenac acis, Diclofenac AbZ and Diclofenac-ratiopharm. Since market entry these products decreased their price by about 9%.

Conclusion

In dermatology, late and small price reductions of the market leader are sufficient to counteract a non-competitive market entry price with consecutive price reductions of the generic and to protect market share.

No.	Product	Date	Trend	Old price	New price	Change [%]
1	Solaraze 50 g	01.02.2016	↑	76.79 €	78.25 €	1.9%
	Solaraze 90 g	01.02.2016	↑	129.09 €	131.65 €	2.0%
2	Solaraze 50 g	01.12.2016	↓	78.25 €	72.80 €	-7.0%
	Solaraze 90 g	01.12.2016	↓	131.65 €	118.45 €	-10.0%
3	Solacutan 50 g	01.10.2016	↓	78.21 €	66.50 €	-15.0%
	Solacutan 90 g	01.10.2016	↓	131.61 €	111.50 €	-15.3%
4	Solacutan 50 g	15.11.2016	↓	66.50 €	61.86 €	-7.0%
	Solacutan 90 g	15.11.2016	↓	111.50 €	104.40 €	-6.4%
5	Diclofenac acis 50 g	01.09.2018	↓	67.50 €	61.86 €	-8.4%
	Diclofenac acis 90 g	01.09.2018	↓	114.78 €	104.40 €	-9.0%
6	Diclofenac AbZ 50 g	15.10.2018	↓	63.52 €	58.20 €	-8.4%
	Diclofenac-ratiopharm 50 g					
	Diclofenac AbZ 90 g Diclofenac-ratiopharm 90 g					

Market distribution before and after generic entry



- 1) Solaraze 90g, public price increased by 2 %
- 2) Solaraze 90g, public price decreased by 10 %
- 3) Solacutan 90g, public price decreased by 15 %
- 4) Solacutan 90, public price decreased by 6 %
- 5) Diclofenac acis 90g, public price decreased by 9 %

Key findings

- Market entry of the four generics started with high-price strategy followed by price-cuts in short sequence.
- The originator lowered its price by only about 10% shortly after price-cuts of first generic market entry and was able to keep a market share of about 60% within two years of generic competition.
- Further research required to confirm these findings for the current generics.

Sources:

1. IMS Pharmascope. Last access date: 15.10.2018.
2. Lauer-Fischer. Last access date: 15.10.2018

Disclosures

All authors are employees of IQVIA (IQVIA Commercial GmbH & Co. OHG).