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Biosimilars Overview

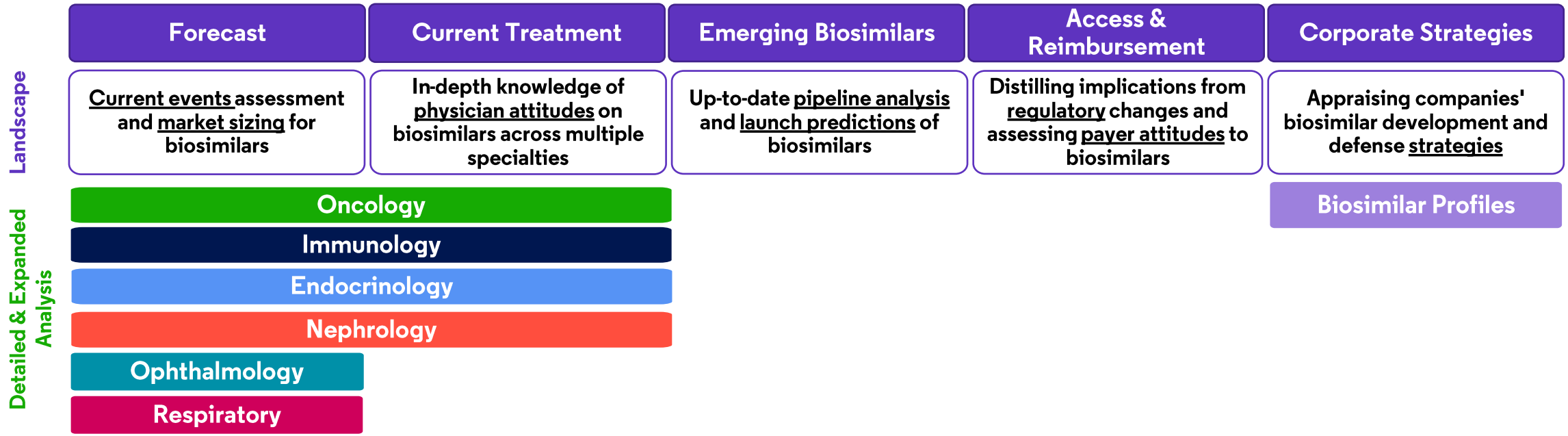
Quick Start Guide

July 2022

What is Biosimilars?

Biosimilars is part of a suite of Clarivate applications on our Disease Insights platform. It sizes the potential opportunity and evaluates the disruptive effects of biosimilars could have on the pharma industry. Biosimilars is based on surveys of over 500 physician specialists, 60 US payers, and country-specific interviews with 10 EU5 payers.

- **Landscape** provides insights that are critical to understanding the biosimilars landscape for all therapeutic areas.
- **Detailed & expanded analysis** provides in-depth analysis within select core research modules for the four leading therapeutic areas for biosimilars.



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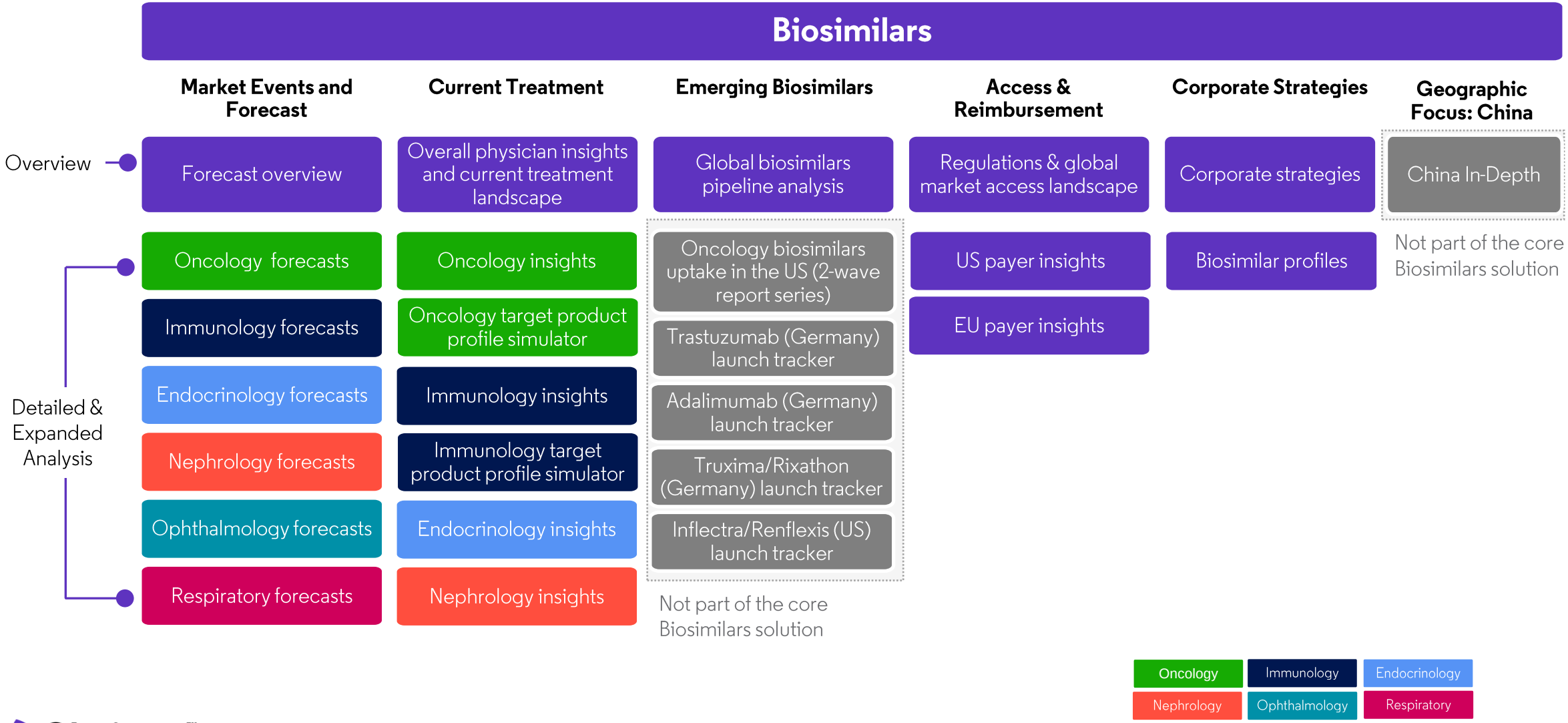
Summary of Biosimilars on Insights Platform



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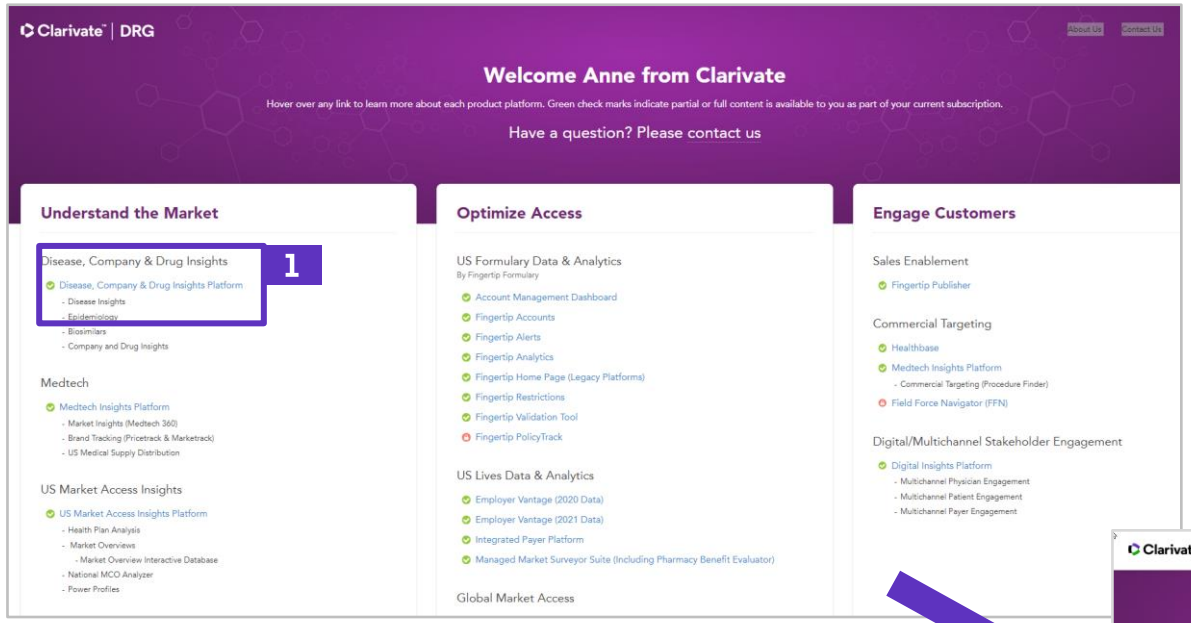
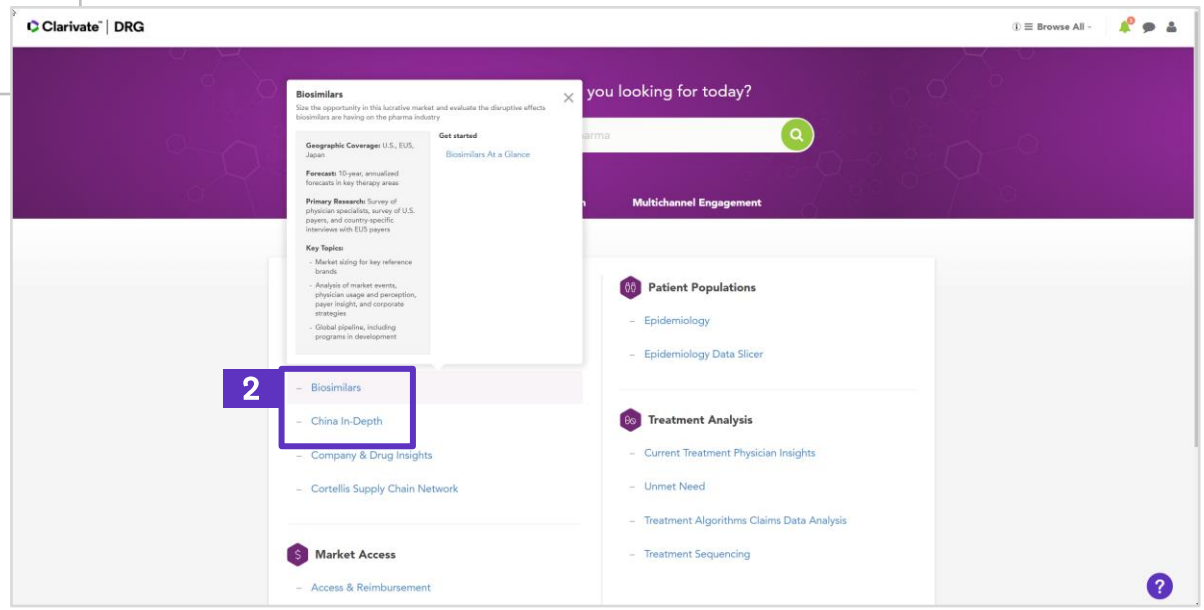
Get started using Biosimilars



1.
Click on the “Disease, Company & Drug Insights” link to launch the Disease, Company & Insights platform.

2.
Click Biosimilars link and then select Biosimilars At a Glance link.



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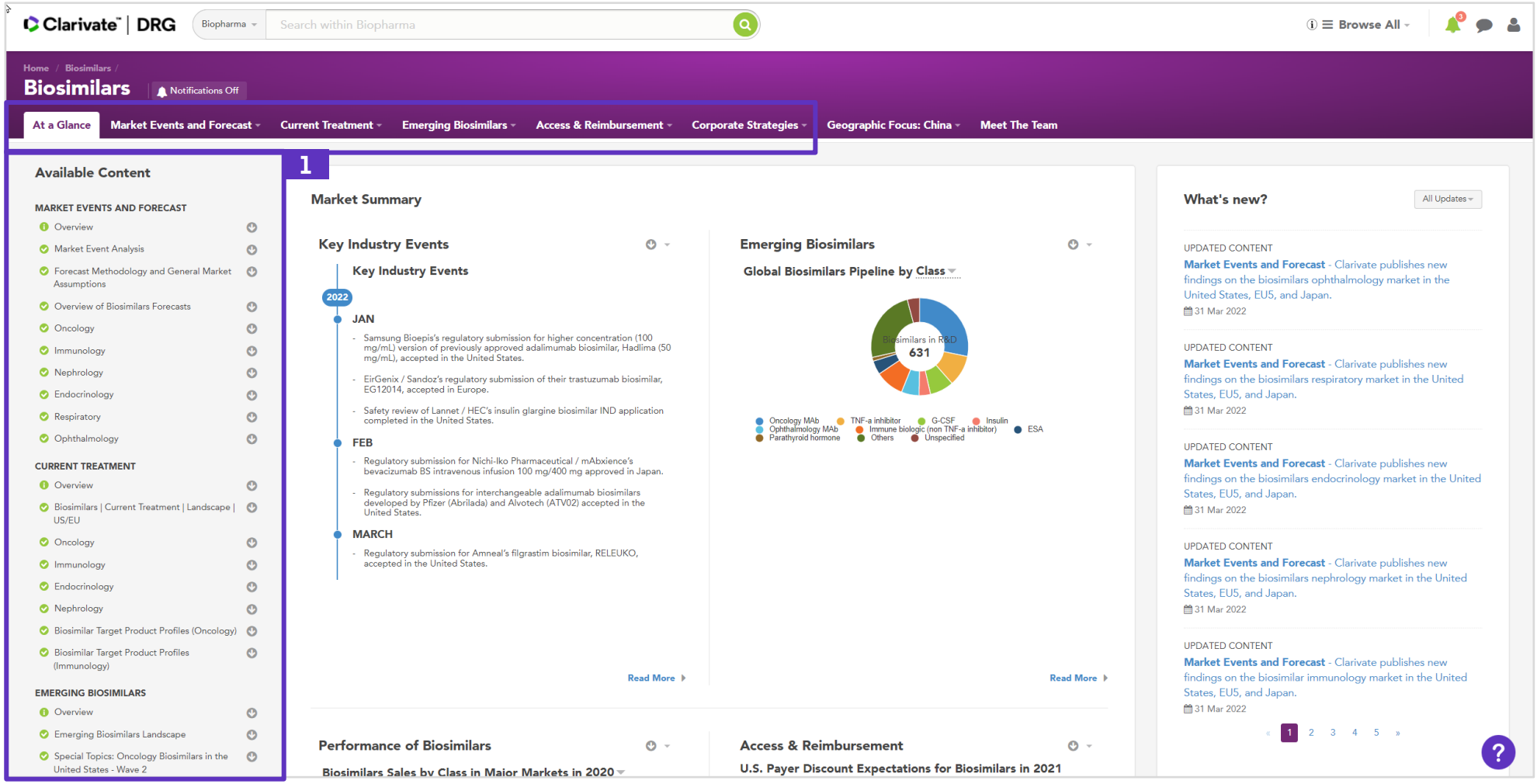
Biosimilars Report At a Glance



1.
The At a Glance page displays all of the modules available within Biosimilars:

- Market Events and Forecasts
- Current Treatment
- Emerging Biosimilars
- Access & Reimbursement
- Corporate Strategies

These modules can be accessed via the tabs in the report banner or via the Available Content directory.

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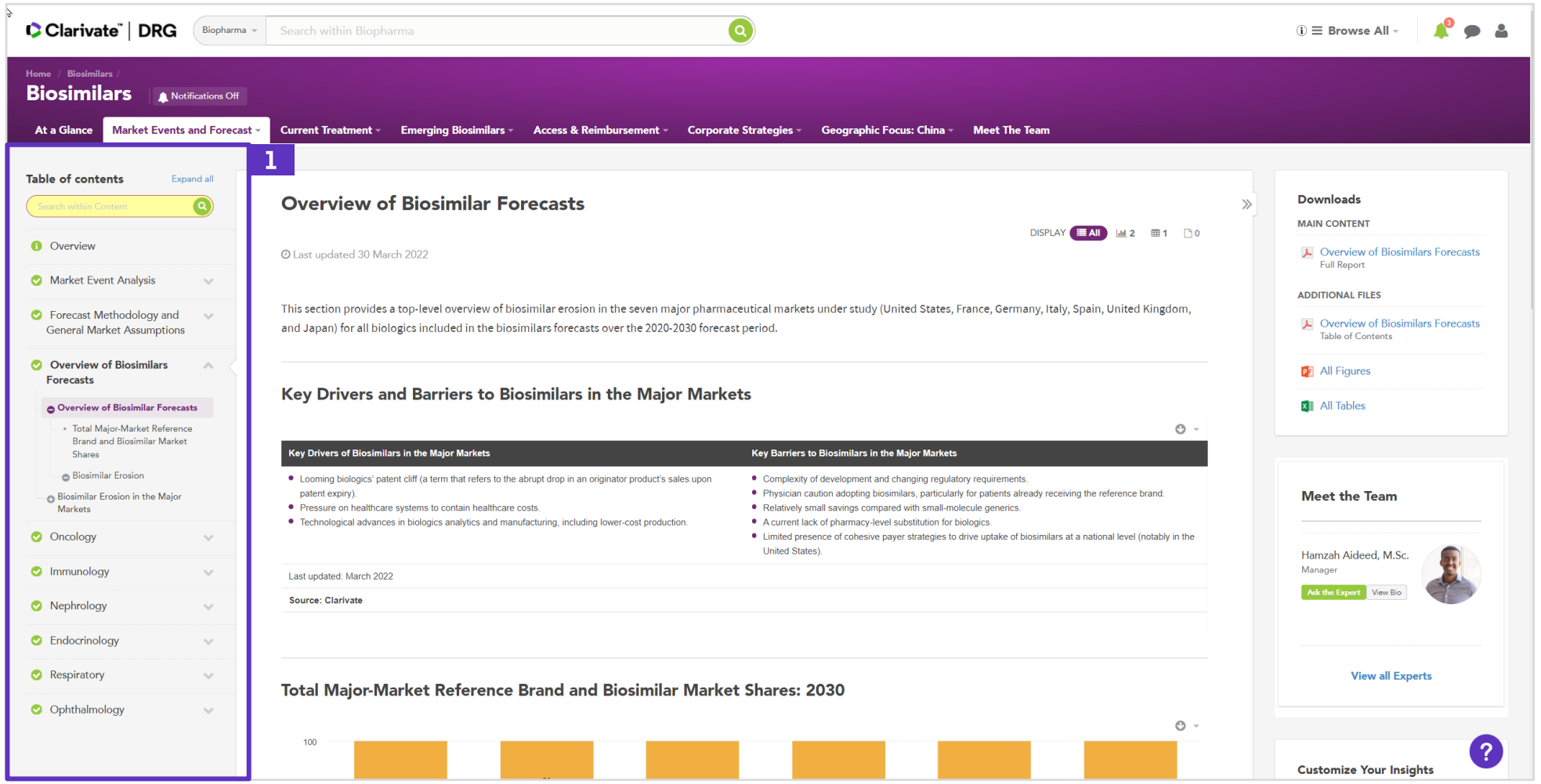
Biosimilars Market Events & Forecast Module



1.

This module provides market events and biosimilars forecasts overall and in key therapy areas of oncology, immunology, nephrology, endocrinology, respiratory, and ophthalmology. Chapters include:

- Market event analysis
- Overview of biosimilars forecasts – size current market and assess historical sales performance. Includes forecasts at the geographic and drug class level.
- Therapy area forecasts– includes quantitative market forecasts for over 40 brands and their biosimilars with sales, market share, patient share across US, EU5, and Japan markets.

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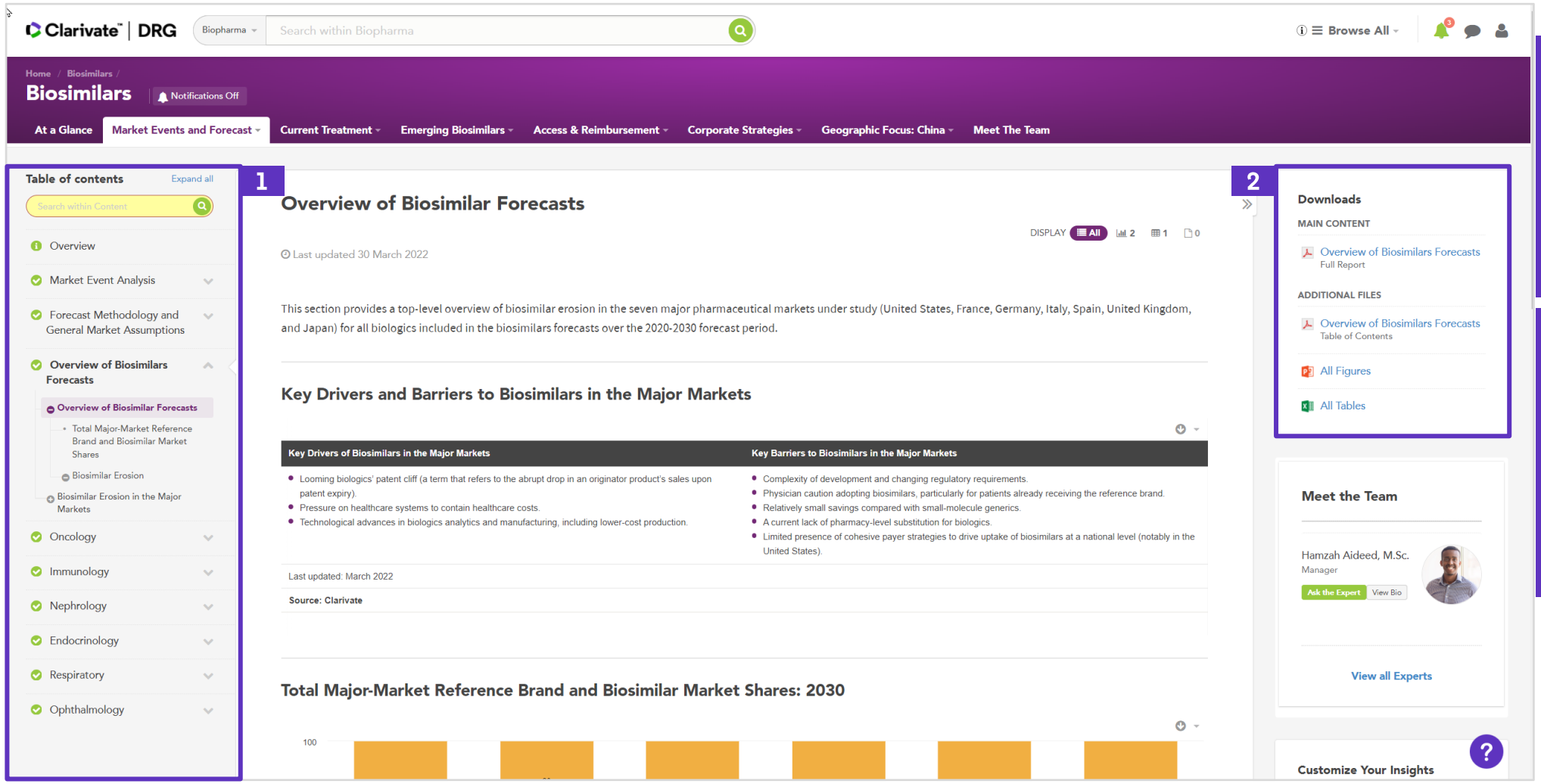
Biosimilars Market Events & Forecast Module (cont.)



1.
Select Table of contents sections or enter word search term in search field to locate topic of interest. Word matches will be highlighted in yellow.

2.
Reports can be downloaded by selecting the reports of interest. The accompanying PowerPoint diagrams and Excel tables can be downloaded as separate documents.

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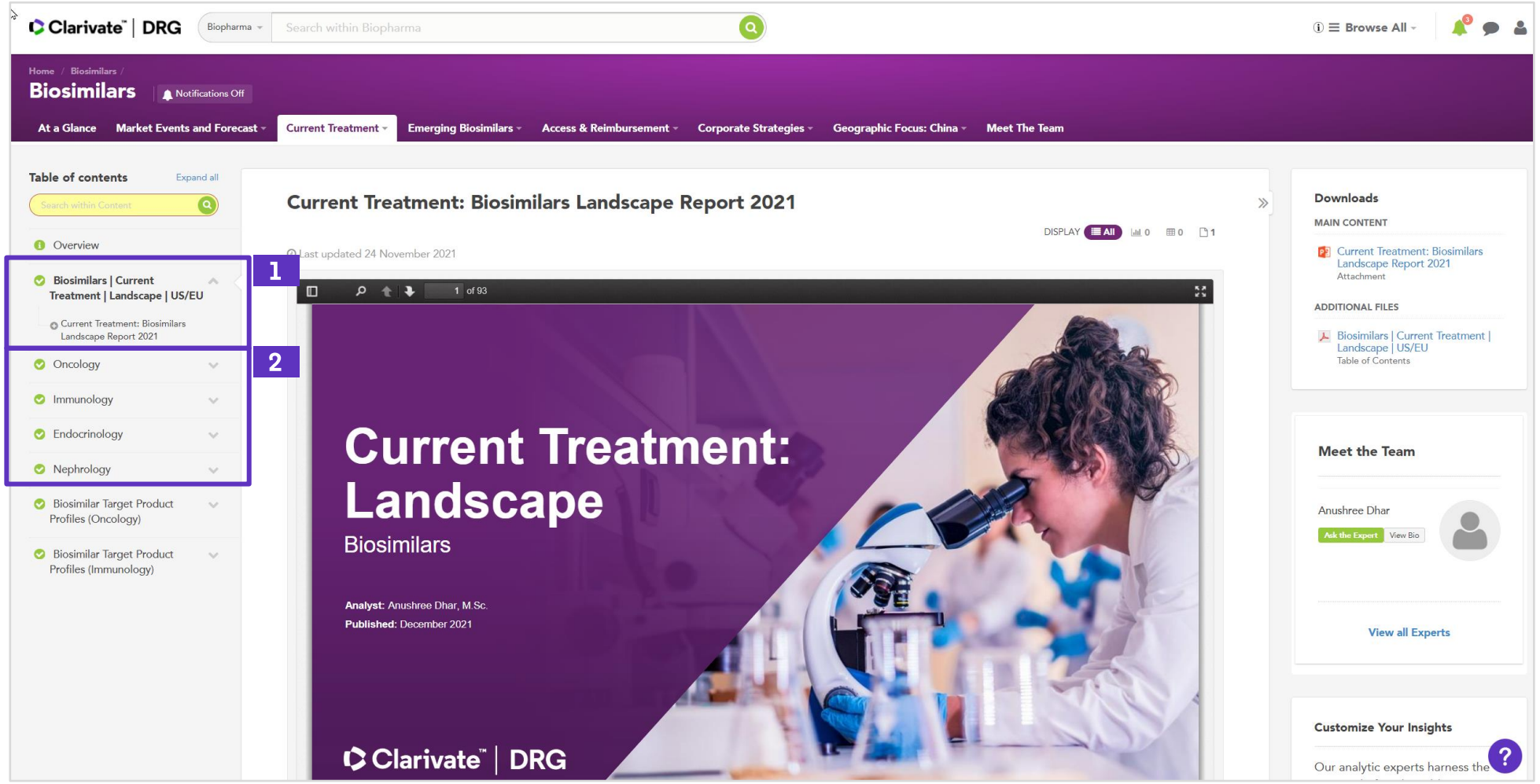
Biosimilars Current Treatment Module



1.
The Current Treatment Landscape provides overarching physician perspectives on biosimilars from ~540 physicians across 6 specialties in the US and EU

2.
Therapy area-specific analysis of physician-reported current and anticipated use of biosimilars, drivers and barriers to biosimilar use, and how physicians are choosing between biosimilars.

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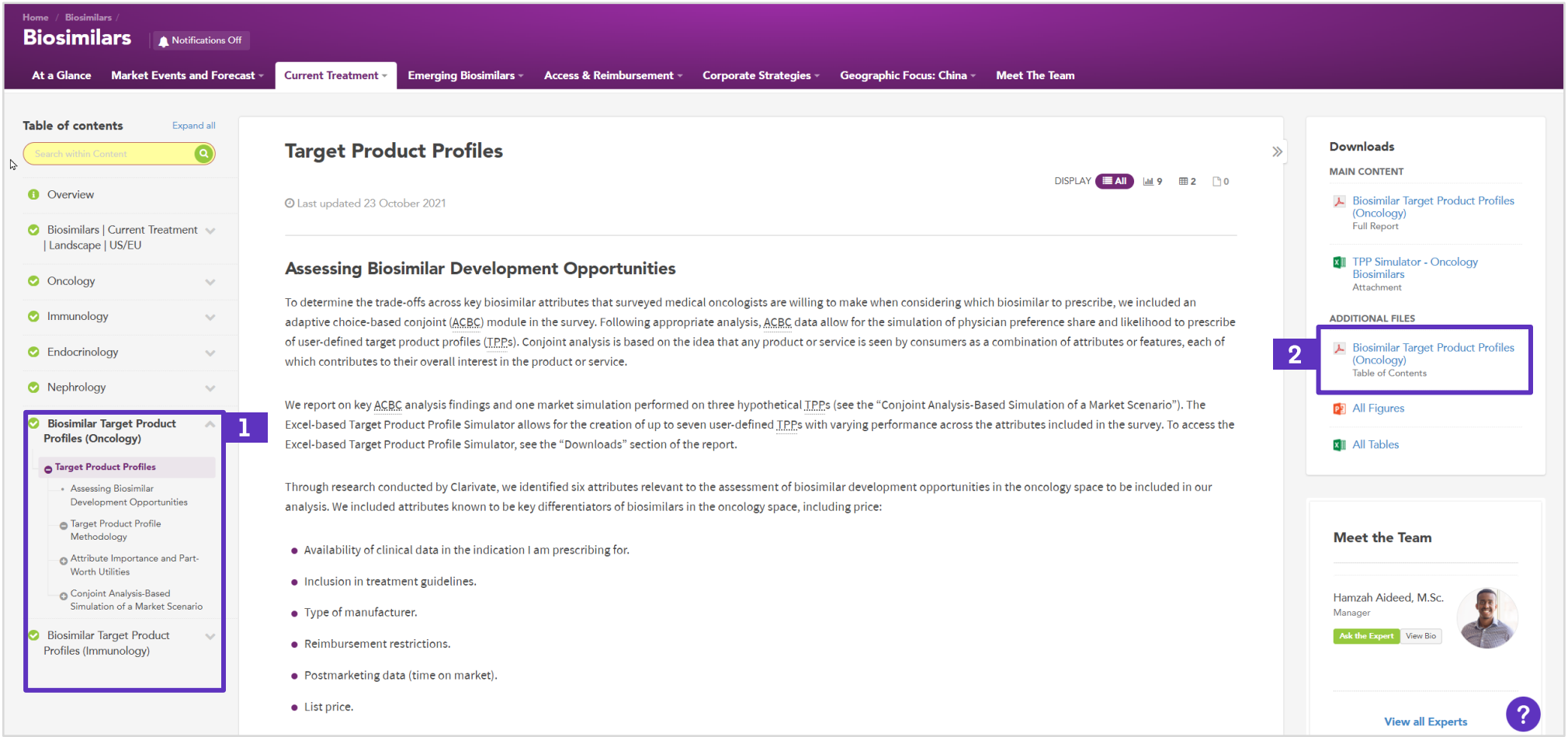
Biosimilars Target Product Profiles



1.
Select Target Product Profiles (TPP) for Oncology and Immunology. TPP uses conjoint analysis methodology to determine trade-offs across key biosimilar attributes that surveyed oncologists are willing to make when considering which biosimilar to prescribe.

2.
Download the Target Product Profile (TPP) Simulator tool to run market simulations

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Interactive target product profiles: oncology & immunology

Quantify how physicians choose between multiple biosimilars of a given reference product based on specific attributes (including price). Understand the preference share and likelihood to prescribe each biosimilar product based on modelling different clinical and non-clinical attributes.

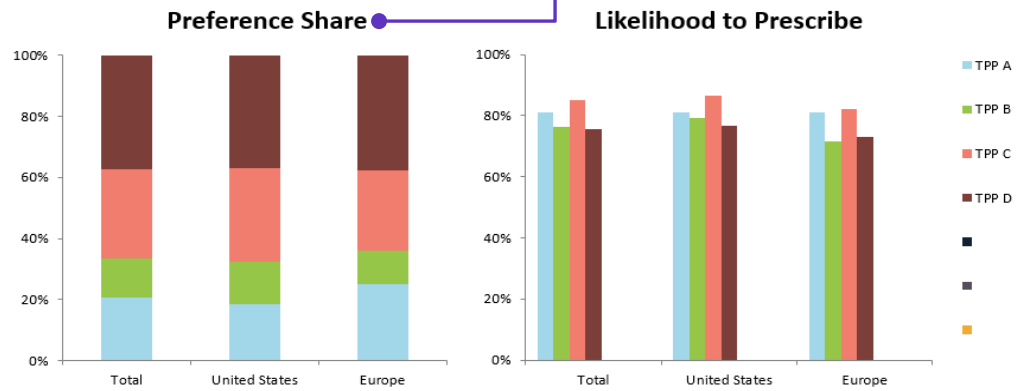
Choose attribute levels for each biosimilar TPP

Compare up to 7 TPPs across 6 attributes

Learn preference share and likelihood to prescribe custom biosimilar TPPs versus others

RESULTS Preference Share	Total	United States	Europe
TPP A	20.6%	18.4%	24.9%
TPP B	12.9%	13.8%	11.2%
TPP C	29.2%	30.9%	26.0%
TPP D	37.3%	36.9%	37.9%

Likelihood to Prescribe	Total	United States	Europe
TPP A	81.0%	81.0%	81.1%
TPP B	76.5%	79.1%	71.5%
TPP C	85.1%	86.7%	82.0%
TPP D	75.5%	76.8%	73.1%



ATTRIBUTE	TPP A	TPP B	TPP C	TPP D	TPP E	TPP F	TPP G
Attribute 1	32	36	36	40			
Attribute 2	10	12	12	14			
Attribute 3	40%	60%	60%	60%			
Attribute 4	15%	15%	5%	5%			
Attribute 5	11%	11%	1%	1%			
Attribute 6	Intravenous	Intravenous	Intravenous	Oral			
Price	$6,500.00	$8,500.00	$8,500.00	$10,000.00	$2,000.00	$2,000.00	$2,000.00
Include Product?	☑	☑	☑	☑	☐	☐	☐

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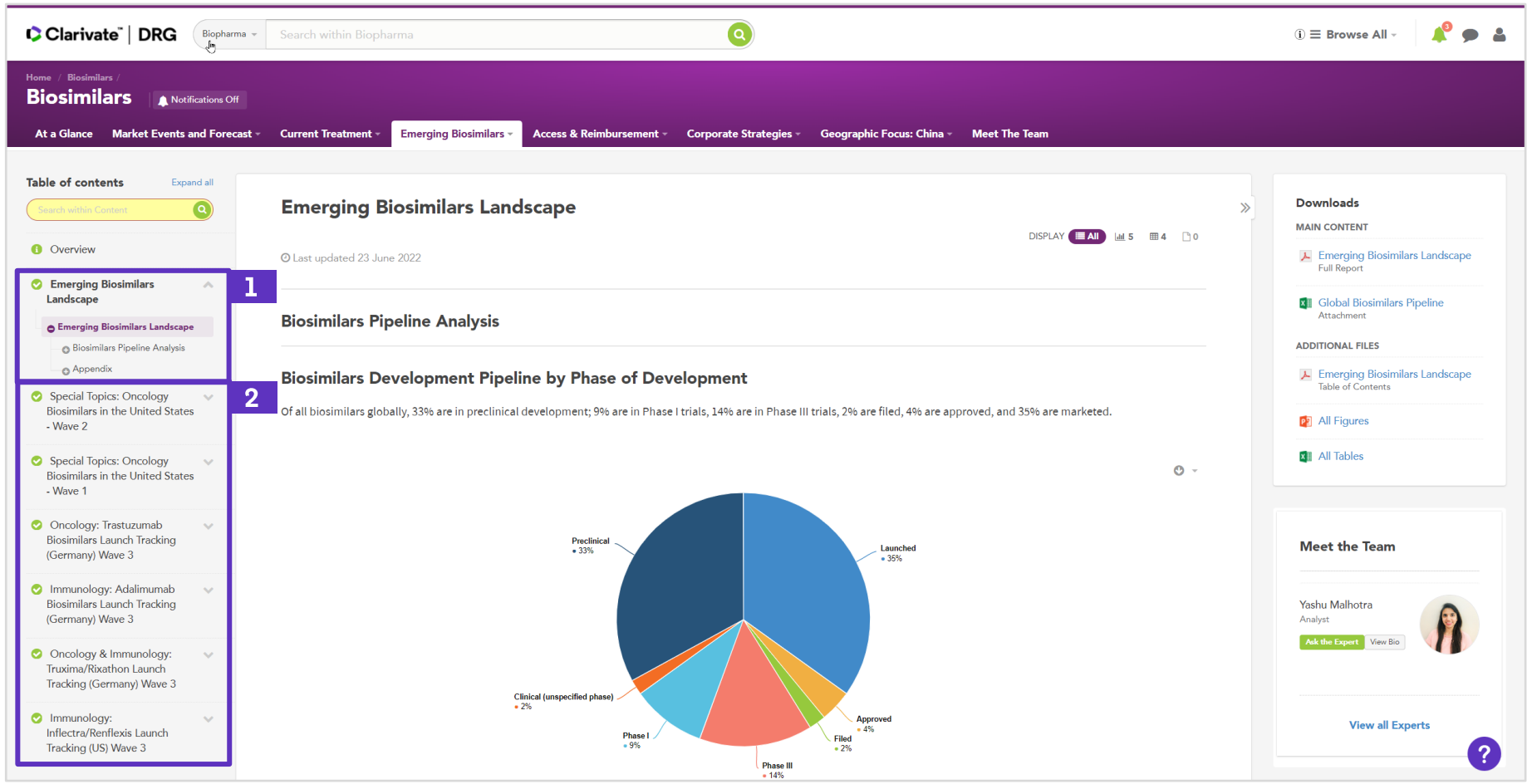
Emerging Biosimilars Module



1.
The Emerging Biosimilars module contains the global pipeline analysis curated by our experts to provide insights into the evolving marketplace. Analyses are updated quarterly to reflect major market events and changes in biosimilar launch dates.

2.
There are additional supporting biosimilars launch tracking reports, however these are not part of the core Biosimilars suite.

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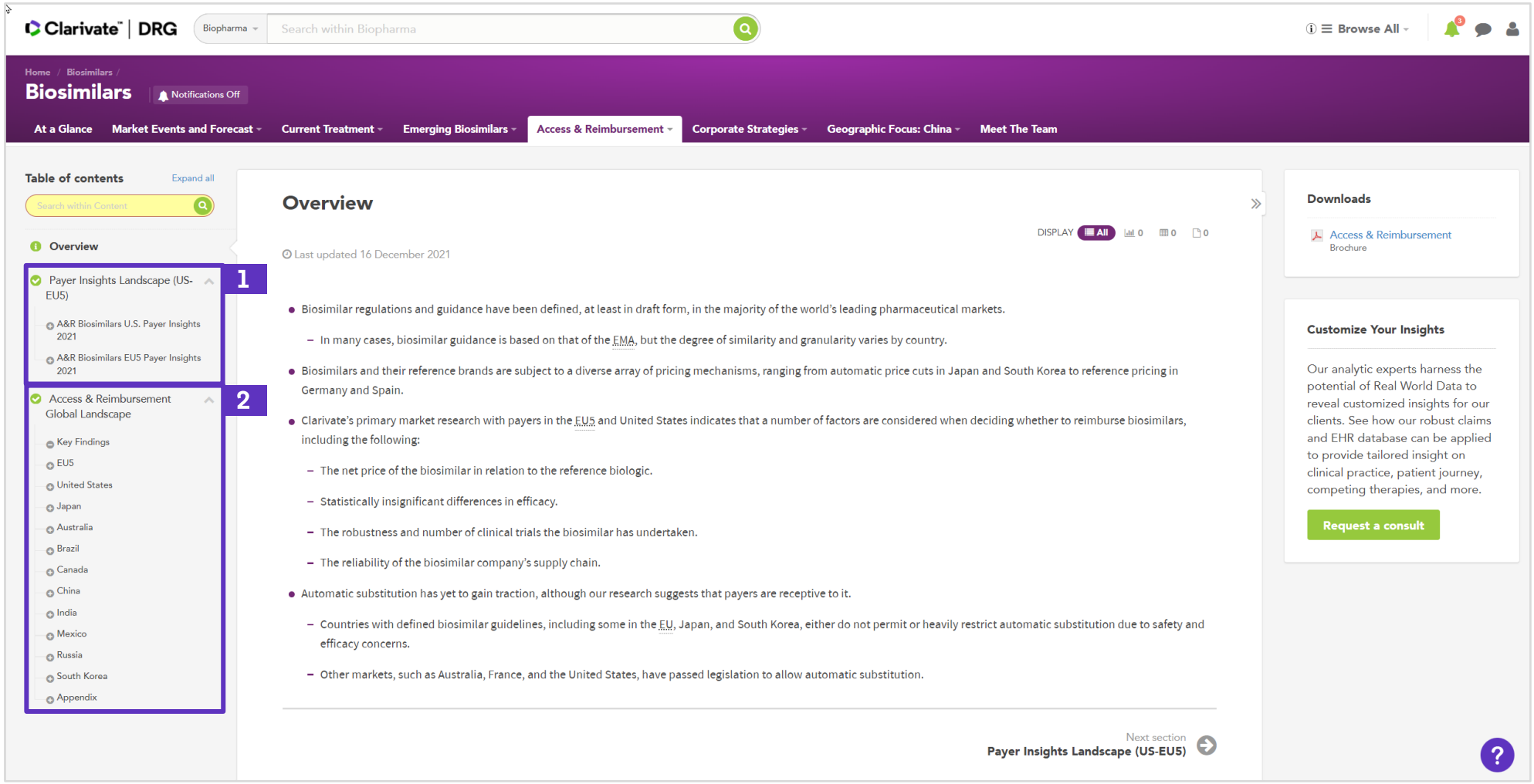
Biosimilars Access & Reimbursement Module



1.
The Payer Landscape is based on surveys of 60 US payers and interviews with 10 EU5 payers and provides insights into drivers and barriers to uptake of biosimilars, pricing expectations, and factors influencing choice among biosimilars.

2.
The global landscape provides a primer on biosimilars policy, regulations, pricing, reimbursement in US Europe Japan and rest of world.

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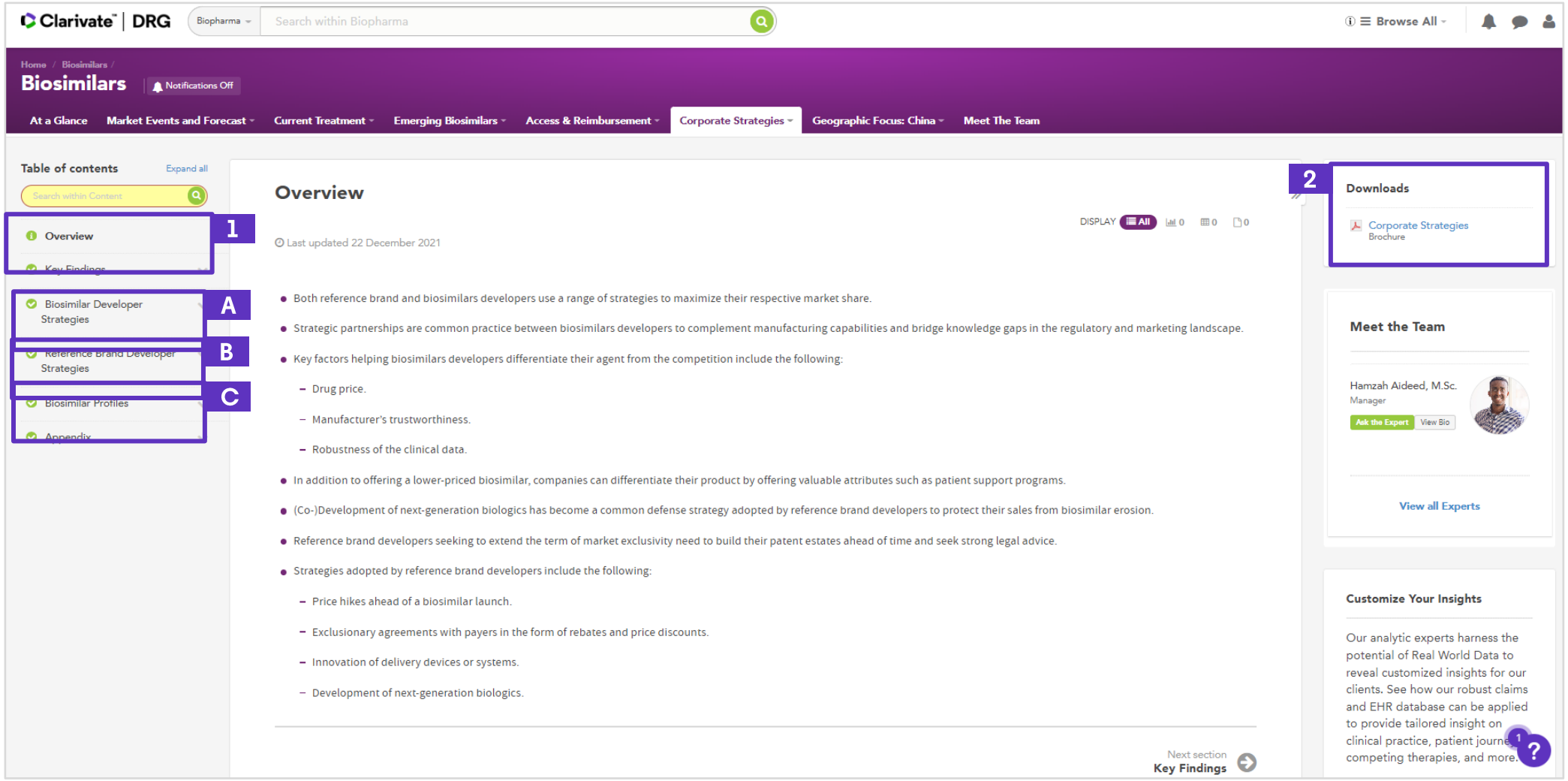
Biosimilars Corporate Strategies Module



1.
Corporate strategies provides critical competitive intelligence and actionable recommendations on how to maximize market share.

A. Strategic secondary research highlights how the leading players are seeking to defend their innovator biologics portfolios.
B. Assessment of the leading biopharma companies establishes those most at risk from biosimilar competition.
C. Profiles on the leading biosimilars companies provide insights into how market success has been achieved.

2.
Report can be downloaded as PDF.

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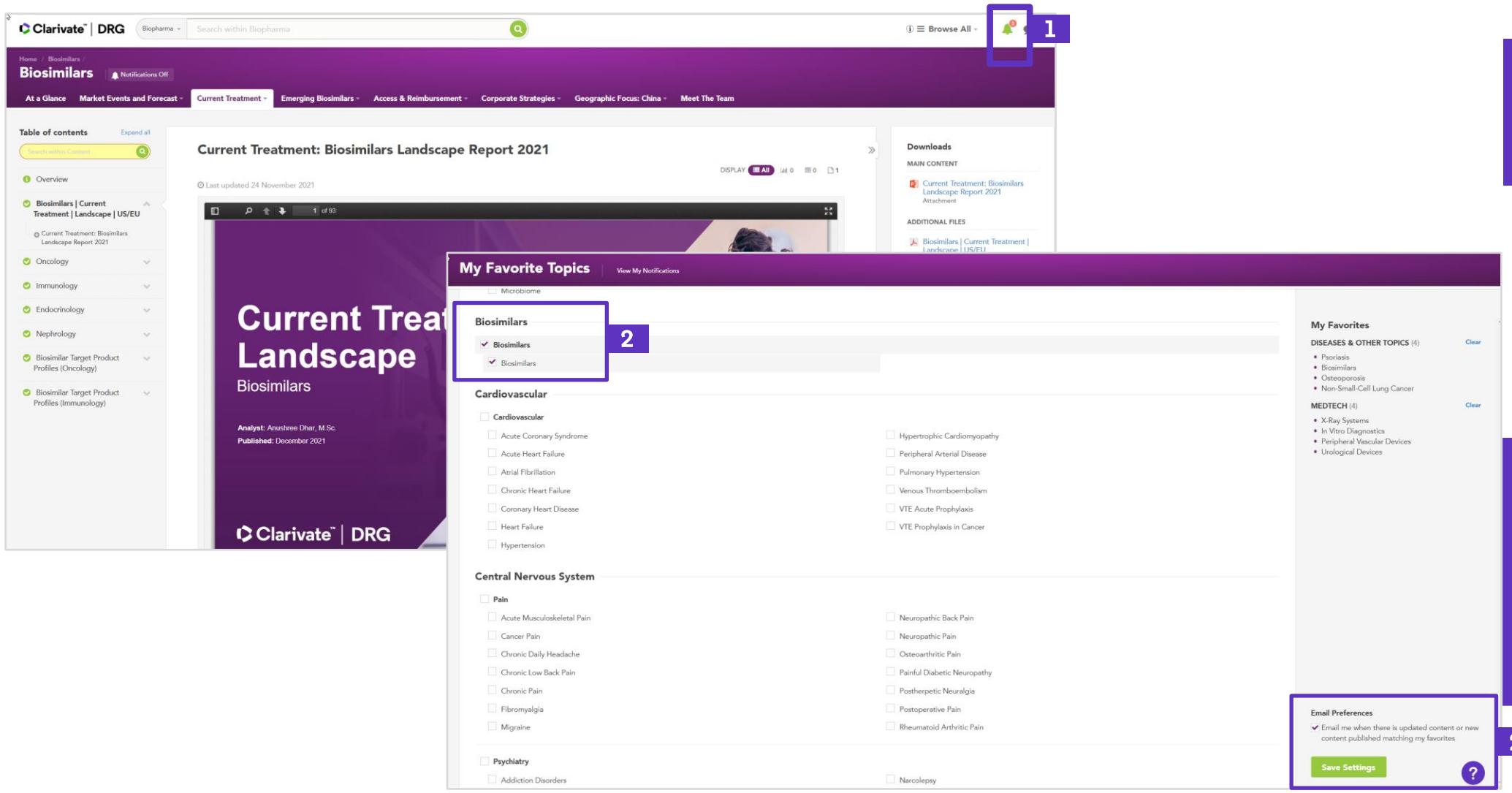
Alerts Request



1.
To request email alerts of Biosimilars report key updates, select the bell icon.

2.
Select the disease markets that you are subscribed to, then select the "Email Preferences" checkbox, then select the "Save Settings" button.

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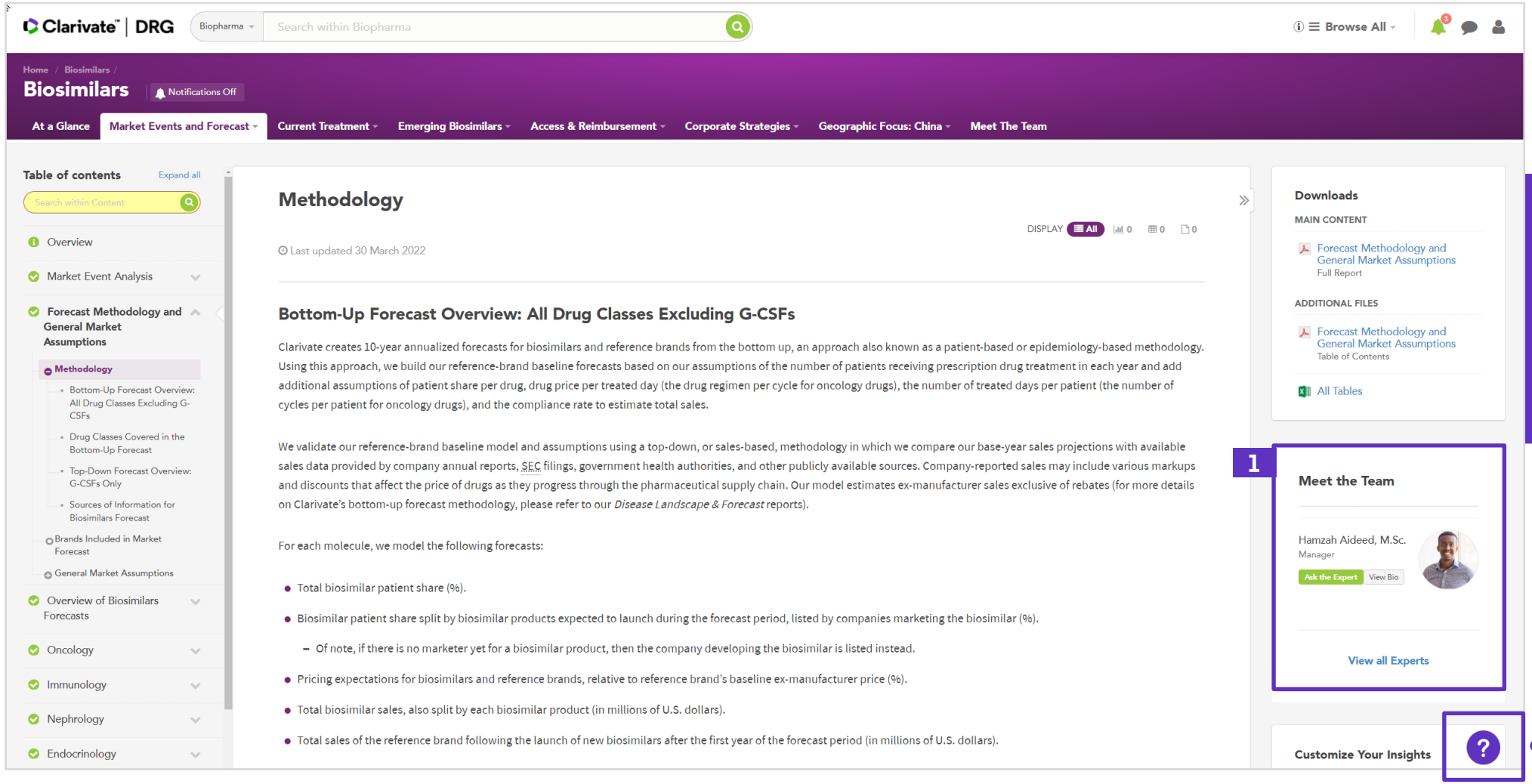
Support Requests



1.
If you have additional questions or training/support requests, select "Ask the Expert" or "Contact Us" located under the "?" (Resources & updates) icon.

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Appendix – Module details

Market events & forecast details

Module details and scope

- **Overview of biosimilars forecasts**
  - Annualized sales, patient shares, and market shares from 2020-2030, segmented by region
  - Forecasted biosimilar- and brand-treated patient numbers
  - Interactive forecasts with graphical visualizations
  - Forecasts for individual biosimilar products
  - Updated biannually
- **Detailed & expanded analysis by therapy area**
  - Download interactive, quantitative market forecasts for over 40 brands and their biosimilars, updated biannually.
  - Access in-depth, transparent assumptions behind the market forecasts.

Key questions answered

- What is the future MARKET SIZE for biosimilars at a regional level, class and molecule level?
- When will different biosimilars ENTER the Major Markets (i.e., U.S., EU5, and Japan) markets and how will they behave?
- How will PRICING dynamics evolve between brands and biosimilars throughout the forecast period?
- Which biosimilar marketers are anticipated to win the greatest market share when competing with multiple biosimilars referencing the same brand molecule?

Current treatment details

Module details and scope

- **Landscape**
  - Gauge how current use of biosimilars compares across 540 physicians from 6 specialties in the United States and Europe (France and Germany).
  - Assess how perceptions of the drivers and barriers to biosimilar uptake vary by specialty and region.
  - Compare physicians' expected future uptake of biosimilars by specialty and region.
- **Detailed & expanded analysis by therapy area**
  - Track physician-reported use of currently available biosimilars
  - Understand how physicians are currently choosing between biosimilars of the same reference product.
  - Understand the barriers and drivers of biosimilar use, including clinical, commercial, patient, and market access factors.
  - Quantify physicians' expectations for future use of biosimilars.
  - Test which biosimilar attributes will have the greatest influence on physician selection of specific biosimilars in oncology and immunology using our interactive Target Product Profiles.

Key questions answered

- What are PHYSICIANS' CONCERNS about biosimilars are how have they changed over time?
- Will physicians SWITCH currently treated patients to a biosimilar or restrict use to new starts?
- Which factors will have the greatest INFLUENCE ON CHOICE of biosimilars

Emerging biosimilars details

Module details and scope

- **Landscape**
  - Global pipeline analysis curated by biosimilars experts provides a clear view of the evolving competitive landscape.
  - Quarterly updates highlight major pipeline changes and biosimilar launch dates for the major markets, by company.

Key questions answered

- When will competitors launch biosimilars in the MAJOR MARKETS?
- How AWARE are physicians of a biosimilar at LAUNCH and over its first year?
- Which patients are physicians selecting to treat with the NEW BIOSIMILAR?

Access & reimbursement details

Module details and scope

- **Landscape**
  - Primer on biosimilars policies, regulations, pricing and reimbursement in the United States, Europe, Japan, and ROW.
  - Understand the strategies in place to encourage use of biosimilars at a national / regional level.
- **Detailed & expanded analysis**
  - Surveys with 60 U.S. payers and interviews with 10 EU5 payers address:
  - The drivers and barriers to uptake of biosimilars.
    - Factors influencing payers' choice between multiple biosimilars.
    - Pricing expectations for biosimilars and innovator brands in a biosimilars market.
  - Current and future strategies used by U.S. and EU5 payers to drive uptake of specific biosimilars.
  - US and EU5 payer attitudes towards specific biosimilars and novel biologics.

Key questions answered

- How are PRICING, REIMBURSEMENT AND SUBSTITUTION policies evolving for biosimilars?
- How do biosimilars REGULATIONS differ across regions?
- How will PAYERS INFLUENCE uptake of biosimilars?

Corporate strategies details

Module details and scope

- Addresses observed and potential strategies of biosimilar developers from target selection through to product launch, providing critical competitive intelligence, as well as actionable recommendations about how to maximize market share.
- Profiles on the leading biosimilars companies provide insights into how market success has been achieved.
- Assessment of the leading biopharma companies establishes those most at risk from biosimilar competition.
- Strategic secondary research highlights how the leading players are seeking to defend their innovator biologics portfolios.

Key questions answered

- How have companies ACHIEVED SUCCESS in the biosimilars market?
- What strategies are being developed to DEFEND AGAINST biosimilars?

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Have a Question?

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