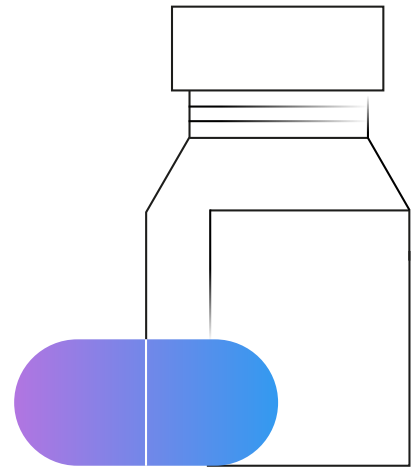


Price Assessment and Indication Expansion in Orphan and Non-Orphan Indications

Case Study | Orphan and Non-Orphan Indications

Assessment of anticipated price erosion and impact on volume and value sales for a marketed mAb across various launch scenarios



Background

A top-10 pharmaceutical company was planning for an indication expansion of one of its leading assets into two orphan indications and one non-orphan indication.

Our client wanted to understand the impact of different indication expansion scenarios (both from a go/no-go and timing perspective) on Product X's price and total revenue in key European markets (Germany, France and Spain).

The Challenge

Our client wanted to understand:

- What is the payer willingness to pay & associated impact on Product X's price under different standalone vs bundled launch scenarios?
- What are the volume/price/revenue trade offs for each launch scenario considering "natural" vs. indication expansion-led price erosion & potential volume loss in the lead indication?
- Should they launch in all follow-on indications?

The Solution

Clarivate Commercial Consulting

- Performed analog analysis to evaluate the relationship between patient population expansion, HTA outcomes & price erosion at indication expansion
- Conducted payer interviews to understand payer perception of unmet need & willingness to pay
- Organised working sessions with Global PMA, Medical, & Affiliates to validate volume & price assumptions under the different launch scenarios
- Performed revenue forecast across indication expansion scenarios (including marketed indication) based on payer & client-validated volume & price assumptions

The Results

Strategic go/no-go launch & indication sequencing recommendations



Price erosion and access assumptions under different standalone vs bundled indication expansion scenarios based on analog analysis, payer interviews and client experience



Low, base and upside-case revenue forecast across indication expansion scenarios



Strategic go/no-go launch & indication sequencing recommendations, taking into account all relevant volume/price/revenue tradeoffs (including potential volume loss due to the key competitor having expanded into one of the no-go indications, which is a condition usually concomitant to the lead indication)

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