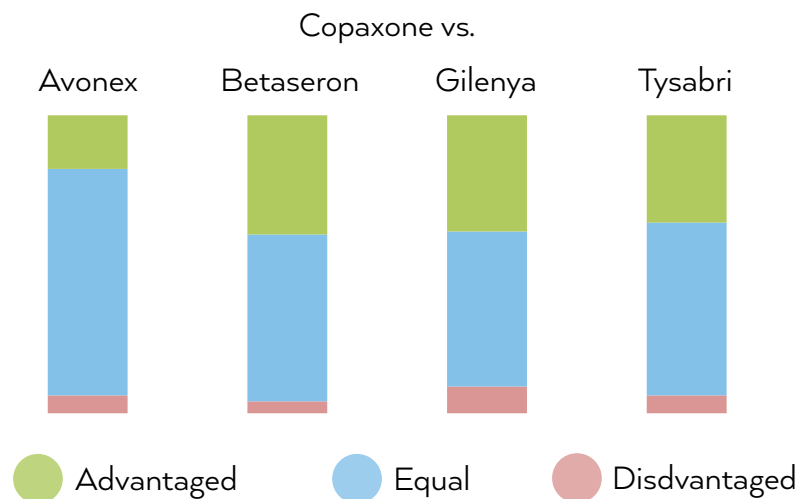


Reality Check: Multiple Sclerosis

Coverage

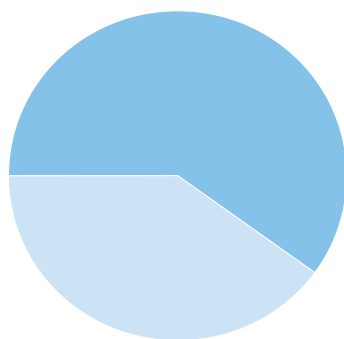
Drugs

All brands in this class face restrictions on some plans, even when preferred. A national market access snapshot reveals that the leading treatment, by revenue, has a slight advantage against other leading brands.

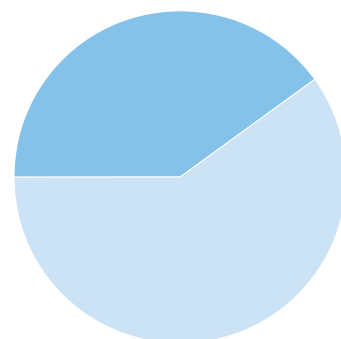


Payers

Utilization management from top payers reveals the limited amount of step edits and prevalence of PA policies. Over half of the largest players require prior authorizations for leading drugs.



55% of top plans include PA policies



45% of top plans do not have PA policies

Key Players



Reality Check: **Multiple Sclerosis**

Trends

Fighting Back Against MS

Pharmaceutical manufacturers and providers team up to develop innovative treatments for patients suffering from the disease. A piece from [WNYT](#) highlights one treatment that is currently undergoing clinical trials for relapsing remitting and primary progressive MS.

[Via WNYT](#)



Pressure from Manufacturer Restructuring

M&As and corporate restructuring dominate the pharma landscape. An article from [Fierce Biotech](#) describes Biogen's recent drop of their Phase II MS drug, Tecfidera, to divert efforts to Alzheimer's R&D.

[Via Fierce Biotech](#)



Reality Check: **Multiple Sclerosis**

Key Findings

Positive Clinical Developments

Major clinical trials currently test novel approaches to treating all forms of Multiple Sclerosis, including progressive MS. Several treatments in the near-term pipeline will emerge over the coming years.

Limited Use of Medical Benefit

With the exception of Tysabri and Lemtrada, most brands process exclusively through pharmacy benefit, but convoluted coverage and restrictions complicate market access in Multiple Sclerosis.

Market Access Impacts as Copaxone Goes Generic

The generic version of Copaxone will provide strong incentives for pharmacies and payers, which will significantly shift leading drugs' market access. Using effective payer contracting strategies, brand teams have opportunities to replace existing Copaxone deals.

Characteristics

Indications

Multiple Sclerosis

Step Therapy Policies

Payers require products to step through a competitor roughly one-tenth of the time

PA Policies

Restrictive to label policies compose one-fifth of the total PA policies

Medical Benefit

Medical benefit policies only cover two out of the fourteen products