Understanding purchasing patterns and product access of newly launched specialty generics

OBJECTIVE
Given the expansion of specialty generic approvals in the marketplace, this study was conducted to help understand purchasing patterns of newly launched specialty generics. In addition, this study sought to determine whether or not increased access to a specialty treatment was facilitated by the launch of a specialty generic product.

METHODS
To determine purchase patterns of newly launched specialty generics, the rate of change of both the brand and generic products was measured over time. This was accomplished by a purposeful subset of pharmacies purchasing through MHA agreements. The brands and their corresponding generics included in the study were Gleeveca® (imatinib mesylate), Makana® (hydroxyprogesterone caproate), Zyti® (abiraterone acetate), Xenzina® (tadalafil), and Ampyra® (dalfampridine ER). When possible, the brand rate was measured by the units of the brand product purchased the quarter prior to the generic launch compared to the number of units purchased in 1Q19. Gleeveca®, the calculation was done 4Q13 through 1Q19; for Makana®, the calculation was done 1Q18 through 1Q19; and for Zyti®, the calculation was done 3Q18 through 1Q19. This calculation was not possible for branded Xenzina® and Ampyra® given that no pharmacies in the study were able to purchase these limited distribution drugs through a wholesaler.

The generic product rate was measured by the units of generic product in the quarter it launched compared to the number of units purchased in 1Q19, and was calculated for all five study products. For imatinib, the calculation was done 1Q16 through 1Q19, for hydroxyprogesterone caproate, the calculation was done from 2Q18 through 1Q19; for abiraterone acetate, the calculation was done from 3Q18 to 1Q19; for tadalafil, the calculation was done from 3Q15 to 1Q19; and for dalfampridine ER, the calculation was done from 3Q18 to 1Q19.

To detect changes in product access to specialty generics, the number of corporations purchasing the brand was compared to the number of corporations purchasing the generic in 1Q19. Changes in the number of corporations purchasing the branded product and the generic product were also tracked over time.

RESULTS (Continued)
Zytiga® number of units decreased 63% while generic abiraterone acetate unit purchasing grew by 289%. The number of corporations purchasing generic abiraterone acetate increased 60% while the number of corporations purchasing Zytiga® decreased by 56%. When compared to the number of corporations purchasing the brand, the number of corporations purchasing abiraterone acetate increased by 6.1%.

RESULTS
Gleeveca® number of units decreased 80% while generic imatinib unit purchasing grew by 134%. The number of corporations dispensing generic imatinib increased 34% while the number of corporations purchasing Gleeveca® decreased by 76%. When compared to the number of corporations purchasing the brand, the number of corporations purchasing imatinib increased by 114%.

Makena® number of units decreased 67% while generic hydroxyprogesterone caproate unit purchasing grew by 641%. The number of corporations purchasing generic hydroxyprogesterone caproate increased 76% while the number of corporations purchasing Makana® decreased by 94%. When compared to the number of corporations purchasing the brand, the number of corporations purchasing hydroxyprogesterone caproate increased by 77%.

CONCLUSIONS
This study revealed that specialty generic products are very quickly adopted in the marketplace. Particularly steep uptake was noted in those products that have launched specialty generic products more recently (2018 in the cases of hydroxyprogesterone caproate, abiraterone acetate, and dalfampridine ER), suggesting that there may be an increased comfort level and desirability for quickly adopting specialty generics presently as compared to those products which launched several years ago (2016 in the cases of imatinib and 2015 for tadalafil), which showed slower growth curves.

This study also determined that for every product except imatinib, access to purchase, and therefore dispense, the specialty treatment was increased after the launch of the generic as measured by the number of corporations purchasing the generic in 1Q19 compared to the number of corporations purchasing the brand the quarter prior to the generic launch.

It is hypothesized that growth was not seen in the imatinib group due to more patient tolerance issues with the generic compared to the market. Increasing access to specialty generic products allows the pharmacy to remain competitive, service additional patients and referral sources, and continue to grow in the specialty space. This increased access is particularly important in the cases of limited distribution products where pharmacies may have been completely unable to access and dispense the branded versions of the specialty products, such as in the cases of tadalafil and dalfampridine ER.

This study illustrates that those pharmacies utilizing pharmaceutical manufacturer agreements through MHA Specialty Pharmacy Solutions were able to quickly adopt specialty generic products into their practice. Furthermore, MHA Specialty Pharmacy Solutions facilitated increased pharmacy access to many specialty products.

REFERENCES