

Tamsulosin defies rapid price erosion

Strategies for launching generic tamsulosin in the UK have restricted price offers and embraced branded products, apparently in an effort to bolster prices and possibly to deal directly with payers within local health authorities known as primary care trusts.

Reacting to severe price falls for recent new entrants like lansoprazole and sertraline (*Generics bulletin*, 21 April 2006, page 15), generics firms have been disclosing prices only when requested for modified-release tamsulosin 400µg capsules.

They have also opted for brand names for their benign prostatic hyperplasia products, such as Stronazon from Actavis, Pamsvax XL from Arrow, Kirtacap from Consilient, Prosurin XL from Merck firm Generics UK, Morvesin XL from Sandoz, Petyme from Teva and Diffundox XL from Winthrop.

Two companies, Pliva and Stada firm Genus, have had their Bazetham MR and Tabphyn MR capsule brands officially listed as such for the purposes of government reimbursement. Genus has since sold its UK Tabphyn rights to ProStrakan in a 10-year deal. Kiron holds marketing authorisations for Bazetham MR as well as for Diffundox XL and an unbranded version of tamsulosin 400µg capsules.

ProStrakan said the UK market in 2005 for benign prostatic hyperplasia treatments was worth £96.5 million (US\$180 million), of which the Flomax MR brand from Astellas – known as Yamanouchi before it merged with Fujisawa – accounted for £52.8 million.

Withdrawn both brands in November

As Figure 1 shows, Yamanouchi had two brands on the UK market last summer priced at £20.65 for 30-capsule packs in the case of Flomax MR and £23.90 for Omnic MR. September saw the launch of Flomaxtra XL at the lower price of £17.55, which was the same product in film-coated tablet form; Astellas subsequently withdrew both brands of originator capsules in November.

They reappeared in February, however, both at the lower price of £15.35 – shortly before tamsulosin lost its patent protection – but Omnic was now under the Paines & Byrne name, at an address which was the same as that for Astellas. Another price fall became apparent in April, after the generic launch of tamsulosin in March, when Astellas slashed the prices of the two brands to just £10.00.

Pliva's generic Bazetham had an official brand price in April of £19.97, almost twice that of the price-slashed Flomax/Omnic originator, while Tabphyn had an official price of £12.00, which was still above that of the brand. Pliva had a rethink before settling on £16.97 in May, but Tabphyn is currently reimbursed to pharmacists at £7.99, almost exactly the average generic market price.

Initial generic tamsulosin price offers in the marketplace were limited to 16 in March, which was low for a new launch, says WaveData's managing director Charles Joynson, with many suppliers advising independent pharmacists and dispensing doctors that prices were only available on request. Nevertheless, market activity increased to 46 price offers in April, with all sales offers by generic name rather than by branded generic name, says Joynson. He adds that not every wholesaler is selling the generic product.

"The lowest tamsulosin price offers fell rapidly in March, immediately after patent expiry," he observes, "but prices now seem to have recovered somewhat." The price erosion can be seen in Figure 2.

The average price fell less steeply and was £9.49 in April, only just behind the brand originator's revised price of £10.00. This month, generic prices have fallen further behind the brand, with the lowest price offer in the first half of May recorded at £6.25, compared with an average price of £7.97 (see Figure 3).

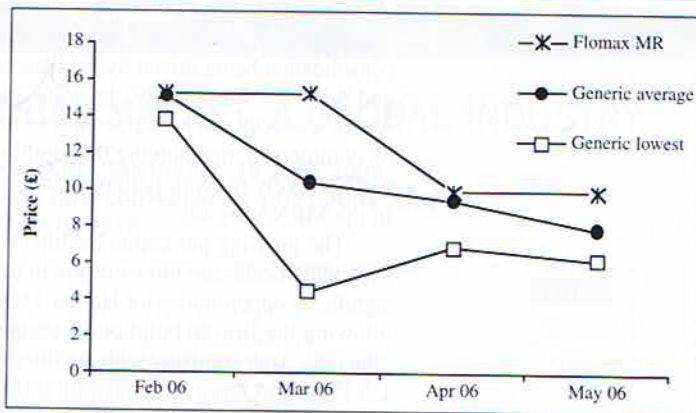
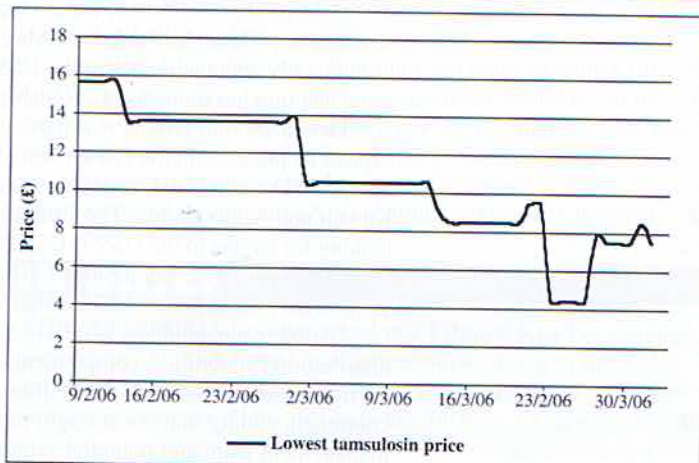
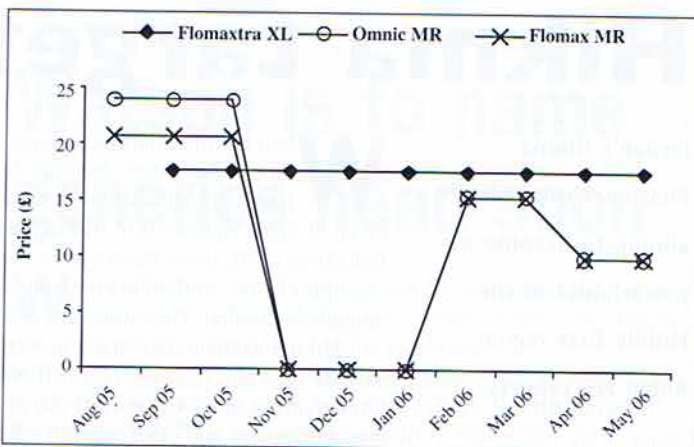


Figure 1 (top): Official prices of Omnic MR and Flomax MR 30-capsule packs of modified-release tamsulosin 400µg since Astellas' launch of Flomaxtra XL film-coated tamsulosin tablets last September. Figure 2 (centre): Lowest daily price offers for 30-capsule packs of generic modified-release tamsulosin 400µg since launch in March. Figure 3 (above): Lowest and average prices of 30-capsule packs of tamsulosin 400µg in each month since generic launch, compared with the prices of brand originator Flomax/Omnic (Source – WaveData).

PRICE WATCH UK

highlights generics price changes in the UK market and appears exclusively in every issue of *Generics bulletin*, courtesy of the Pharma TouchStone service of WaveData.

WaveData collects and collates pricing information from a number of European countries. In the UK, pricing information about generics, brands and parallel imports is gathered from offers made to independent retail pharmacists and dispensing doctors by wholesalers and generic manufacturers. WaveData collates this data and publishes the results as its Pharma TouchStone service. This is designed to give customers of the service fast, accurate, real-time access to current generic prices.

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