

Global market assessment of the current and future Precision Medicine landscape to optimize future launch strategies for a global biopharma client



Client Challenge

The client was looking to expand its investment in its Precision Medicine organization and sought KPMG's assistance in assessing the competitive landscape within a number of countries, as well as the regulatory, reimbursement, technology, and commercial landscapes for each target market. Data would be used to determine future market entry strategies for new therapies

Project Phases

Alignment on Scope and Existing Data

Conducted kick-off workshop to align on project objectives, desired outcomes, and review existing client data to define potential gaps and inform research focus areas

Primary and Secondary Research Campaigns

Launched and executed primary and secondary research campaigns, substantiating baseline information and testing emerging themes through targeted survey of in-market pathologists

Synthesize findings into global and country reports

Worked closely with client leads to develop complete global summary and country-level landscape assessment reports

Outcome For The Client



Research and analysis was distilled into country-by-country landscape assessment reports



A comprehensive competitive analysis was produced, outlining each competitors' approach to Precision Medicine



Consolidated global roll-up report was presented to the clients global and regional leadership teams

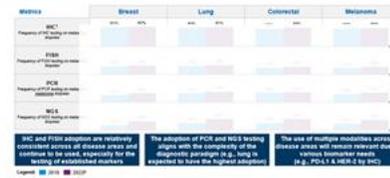
Diagnostic Regulatory & Reimbursement Overview

The Di regulatory & reimbursement process and timing should be factored into strategic plans including partner selection

Metrics	USA	Canada	UK	France	Germany	Italy	Spain	Japan	China	India	Brazil	South Africa	Other
Time to regulatory approval (mo.)	12	18	15	18	18	18	18	18	18	18	18	18	18
Incremental time to reimbursement (mo.)	12	18	15	18	18	18	18	18	18	18	18	18	18
Does reimbursement vary by region?	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Are biomarker specific reimbursement codes used?	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Is NGS reimbursement via bundle / limited?	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Is commercial specialty lab NGS testing reimbursed?	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Does the market have CDx requirements?	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Modality Adoption Assessment

Testing frequency is expected to rise in aggregate as less costly modalities (i.e. IHC and FISH) continue to be used for established biomarkers (e.g. PD-L1) and PCR and NGS become more prevalent to test for a wider array of actionable targets



Market Leader Analysis

Market analysis by country

