

# Market Access Impact (EU5) [Cancer Pain]

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## Abstracts

Market barriers may not be the only reason doctors don't prescribe your brand

Market barriers only affect 12% of cancer pain prescriptions in the EU5 countries. Most brands gain market share because of them, but for some brands, perception may be an even bigger problem. And over 10% of doctors either wouldn't prescribe these brands, or simply haven't heard of them at all.

Find out how doctors see your brand, and whether market barriers are dragging your market share down, in Market Access Impact: Cancer Pain (EU5).

Based on a survey of 150 medical oncologists, the report covers 7 major therapies from Kyowa Kirin, Teva, Takeda, and Mundipharma/Napp. Handy graphs and charts show you how 7 barriers affect your market share, revealing which competitors you gain share from, and lose it to.

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### Top Takeaways

Most brands gain. While every brand wins and loses share because of barriers, 5 of the 7 surveyed brands see a net gain, albeit very small for some brands.

No one barrier is to blame. Most of the 7 barriers covered in the report affect the same amount of prescriptions.

Barrier impact is small. Over 45-65% of surveyed doctors experience only one

barrier with any given brand, but for some brands that climbs to 3 barriers.

Some brands are hit harder by certain barriers. Learn which brand doctors have the most trouble reimbursing, which three products lose out due to patient type recommendations, and more.

Do the brands have a perception problem? Up to 30% of doctors either wouldn't consider prescribing these brands, or haven't heard of them at all.

## Insight into 7 Major Cancer Pain Treatments

Abstral (fentanyl sublingual; Kyowa Kirin)

Actiq (fentanyl transmucosal; Teva)

Effentora (fentanyl buccal; Teva)

Instanyl (fentanyl intranasal; Takeda)

Oxycontin (oxycodone CII; Mundipharma/Napp)

OxyNorm (oxycodone IR; Mundipharma/Napp)

PecFent (fentanyl intranasal; Kyowa Kirin)

## Exploring Market Access Barriers

Market Access Impact: Cancer Pain (EU5) explores key issues affecting drug manufacturers. You'll learn:

How barriers affect market access:

What brands do doctors prescribe the most?

How many prescriptions do barriers affect?

Which barriers have the biggest impact?

How barriers affect your brand:

How many doctors prescribe your brand? How many don't, but would consider it?

Why don't doctors prescribe your brand? What do they prescribe instead?

Which competing brands does your brand take market share from?

A Report Based on Expert Knowledge

We surveyed 150 medical oncologists—30 from each EU5 country (France, Italy, Germany, Spain, UK)—chosen from the largest community of validated physicians in the world.

All respondents:

Have been practicing for 2+ years

Prescribed at least one of the listed products

Seen at least 5 patients with NSCLC in total in the last month

We conducted the survey between September 1-12, 2017

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## Contents

**1.WHAT ARE MARKET BARRIERS?**

**2.ABOUT THIS REPORT**

**3.ABOUT THE SURVEY**

**4.BRANDS INCLUDED IN THE SURVEY**

**5.EXECUTIVE SUMMARY**

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