

# Market Access Impact (EU5) [Growth Hormone Deficiency]

<https://marketpublishers.com/r/MDC2B36EC89EN.html>

Date: May 2017

Pages: 0

Price: US\$ 5,145.00 (Single User License)

ID: MDC2B36EC89EN

## Abstracts

Market barriers may be costing you share, but perception could be the bigger problem

Market barriers affect nearly 25% of growth hormone prescriptions in the EU5 countries. Most brands lose market share because of them, but for some brands, perception may be an even bigger problem. As many as 16% of the doctors we surveyed 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: GHD (EU5).

Based on a survey of 150 adult- and paediatric endocrinologists, the report covers 7 major therapies from Eli Lilly, Ipsen, Ferring, Merck KGaA, Novo Nordisk, Pfizer, and Sandoz. Handy graphs and charts show you how 7 barriers affect your market share, revealing which competitors you gain share from, and lose it to.

### Top Takeaways

Most brands lose out: While every brand wins and loses share because of barriers, 5 of the 7 surveyed brands see a net loss.

One brand runs the table: The 3rd place brand sees a net share gain from every other surveyed brand, but without barriers, it would take a big hit and drop to 4th place.

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

Doctors experience few barriers with each brand: Over 75% of surveyed doctors experience at most one barrier with any given brand.

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

Three drugs have a perception problem: Up to 16% of doctors either wouldn't consider prescribing these brands, or haven't heard of them at all.

## Insight into 7 Major GHD Treatments

Genotropin (somatropin; Pfizer)

Humatrope (somatropin; Eli Lilly)

Norditropin (somatropin; Novo Nordisk)

NutropinAq (somatropin; Ipsen)

Omnitrope (somatropin; Sandoz)

Saizen (somatropin; Merck KGaA)

Zomacton (somatropin; Ferring)

## Exploring Market Access Barriers

Market Access Impact: GHD (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 adult and paediatric endocrinologists—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 GHD in total in the last month

We conducted the survey between May 2nd and 10th, 2017.

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