

# Market Access Impact (EU5) [Haemophilia A]

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## Abstracts

Losing share to competitors? Understanding market barriers can help close the gap

Haemophilia A treatment is a highly competitive market in the EU5 countries, where market shares for several of the brands we surveyed are very close. Understanding the market barriers that prevent doctors from prescribing your brand is essential if you want to build a lasting competitive advantage.

Learn how 7 barriers affect your market share, see who you take share from, and who gets your lost share in Market Access Impact: Haemophilia A (EU5).

Based on a survey of 150 haematologists, the report covers 9 major therapies from Bayer, CSL Behring, Novo Nordisk, Octapharma, Pfizer, Shire, Swedish Orphan Biovitrum.

### Top Takeaways

The barrier effect is split evenly: 4 of the surveyed brands lose share because of barriers, 4 others gain, and one brand breaks even.

Not all brands are widely prescribed: Most brands are prescribed by less than 70% of doctors. However, most doctors are willing to consider brands they don't prescribe.

One brand can't catch a break: The 4th place brand loses share to every other surveyed brand because of barriers.

Barriers affect the market equally: Each of the 7 surveyed barriers affects roughly the same number of prescriptions.

Barriers aren't a problem for all doctors all the time: For the most part, fewer than 20% of doctors experience any one barrier with a given brand.

Patient preferences are a huge problem for one brand: Nearly 20% of doctors experience cost barriers with this brand; 10% more than any competitor.

## Insight into 9 Major Haemophilia A Drugs

Advate (octocog alfa; Antihemophilic Factor [human]; Shire)

Elocta (efmoroctocog alfa; Swedish Orphan Biovitrum)

Feiba (Anti-Inhibitor Coagulant Complex; Shire)

Haemate-P (Antihemophilic Factor/von Willebrand Factor Complex [human]; CSL Behring)

Helixate NexGen (octocog alfa; CSL Behring)

Kogenate Bayer (octocog alfa; Bayer)

NovoEight (turoctocog alfa; Novo Nordisk)

Octanate (purified factor VIII concentrate; Octapharma)

ReFacto AF (morococog alfa; Pfizer)

## Exploring Market Access Barriers

Market Access Impact: Haemophilia A (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 haematologists—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 haemophilia A in total in the last month

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

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