

Market Access Impact (EU5) [Haemophilia B]

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Abstracts

Leading brands have room to grow

At least 30% of the haematologists we surveyed don't prescribe the 7 leading haemophilia B treatments we asked them about. But most are willing to consider them, so there's room for brands to grow. To seize that opportunity, you need to understand the market barriers that are preventing doctors from prescribing your brand, and address the ones that are costing you market share.

Market Access Impact: Haemophilia B (EU5) shows you how 7 barriers affect your market share, revealing which competitors you take share from, and which ones gets your lost share.

Based on a survey of 150 haematologists, the report covers 6 major therapies from CSL Behring, Pfizer, Shire, and Swedish Orphan Biovitrum.

Top Takeaways

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Barriers affect a fifth of prescriptions: The two biggest barriers are responsible for nearly half of that impact.

There's room to grow: None of the surveyed brands is prescribed by more than about 75% of doctors, but most doctors are willing to consider brands they don't currently prescribe.

Downward pressure: Net share losses tend to be bigger than net gains, largely because brands are losing additional share to "other" brands not included in the

survey.

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.

One brand suffers disproportionately: Overall, more doctors tend to experience most barriers with this brand.

Eliminating barriers would break the tie for last place: One brand would get a market share boost of nearly 2%, bumping it into 5th place and putting it in contention for 4th.

Insight into 6 Major Haemophilia B Drugs

Alprolix (eftrenonacog alfa; Swedish Orphan Biovitrum)

BeneFIX (nonacog alfa; Pfizer)

Feiba (Anti-Inhibitor Coagulant Complex; Shire)

Idelvion (albutrepenonacog alfa; CSL Behring)

MonoNine (Coagulation Factor IX [human]; CSL Behring)

Rixubis (nonacog gamma; Shire)

Exploring on Market Access issues

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

How barriers affect market access:

Which brands are physicians prescribing the most?

How are prescribing decisions being affected by market barriers?

Are some barriers having more impact than others?

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 choose 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 practising for 2+ years

Prescribed at least one of the listed products

Seen at least 5 patients with haemophilia B in total in the last month

We conducted the survey between 1st and 12th May 2017.

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