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Market Access Impact (EU5) [T2DM] (Injectables)

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Abstracts

Find out why doctors can't prescribe your brand, and what you can do about it

Market barriers affect just over a fifth of prescriptions for injectable treatments for Type 2 Diabetes Mellitus in the EU5 countries, and more brands lose market share because of them. Certain barriers are contributing more than most to these declines, but it might not be what you'd expect from such a highly competitive space.

Find out how doctors see your brand, and whether market barriers are dragging your market share down, in Market Access Impact: Type 2 Diabetes Mellitus (Injectables) (EU5).

Based on a survey of 150 diabetologists and primary care physicians, the report covers 12 major therapies from GSK, Novo Nordisk, Sanofi, and Eli Lilly. 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

More brands lose market share than gain. Of the 12 brands included in the survey, 8 lose market share and 4 gain market share. Where does your brand come in the pecking order?

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. Between 35-65% of surveyed doctors experience no barriers, with the rest experiencing only one barrier.

Cost isn't the biggest barrier. While treatment costs do have an impact on prescribing patterns, four other barriers have the same or more of an impact; find out what they are.

Understanding the fine margins could be the difference. The overall barrier impact in EU5 markets is smaller compared to the US, but knowing what commercial levers to pull could make all the difference.

Insight into 12 Major Injectable Type 2 Diabetes Mellitus Treatments

Abasaglar (insulin glargine; Eli Lilly)

Eperzan (albiglutide; GlaxoSmithKline)

Humalog (insulin lispro; Eli Lilly)

Lantus (insulin glargine; Sanofi)

Lyxumia (lixisenatide; Sanofi)

NovoRapid (insulin aspart; Novo Nordisk)

Ryzodeg (insulin degludec/insulin aspart; Novo Nordisk)

Toujeo (insulin glargine; Sanofi)

Tresiba (insulin degludec; Novo Nordisk)

Trulicity (dulaglutide; Eli Lilly)

Victoza (liraglutide; Novo Nordisk)

Xultophy (insulin degludec/liraglutide; Novo Nordisk)

Exploring Market Access Barriers

Market Access Impact: Type 2 Diabetes Mellitus (Injectables) (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:

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

- Been practicing for 2+ years
- Prescribed at least one of the listed products
- Seen at least 5 patients with Type 2 Diabetes Mellitus (Injectables) in total in the last month

We conducted the survey between October 9-20, 2017.

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