

# Market Access Impact: Growth Hormone Deficiency (EU5)

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## Abstracts

GHD: Has one brand found the winning market access strategy in Europe?

Market barriers affect nearly 25% of growth hormone prescriptions in Europe, costing most brands market share.

But one brand's efforts to overcome the three biggest barriers have helped it siphon share from competitors—especially the leading brand.

Find out how barriers affect your brand in Market Access Impact: GHD.

The report covers 7 major growth hormone brands: Genotropin, Humatrope, Norditropin, NutropinAq, Omnitrope, Saizen, and Zomacton.

You'll learn which barriers cost you the most share, which brands you're losing it to, and which ones you're taking it from—information you can use to improve your market access strategy

Get Answers to Key Questions about Growth Hormone Brands

Genotropin (somatropin; Pfizer): Which barrier do more doctors experience with Genotropin than with any other brand?

Humatrope (somatropin; Eli Lilly): Which leading brand takes more market share from Humatrope than any other brand?

Norditropin (somatropin; Novo Nordisk): Which brand is easier to get

reimbursed, Norditropin or Omnitrope?

Omnitrope (somatropin; Sandoz): Is pricing or formulary availability driving bigger share gains for Omnitrope?

Saizen (somatropin; Merck KGaA): Is brand awareness a bigger issue for Saizen or NutropinAq?

Zomacton (somatropin; Ferring): Zomacton has roughly as much market share as “other” brands (not surveyed). Would eliminating market barriers tip the scales in its favour?

## Top Takeaways

Winning market strategy for one brand. Breaking down key barriers earned one brand net share gains against five competitors, and the second largest net share gain overall.

Few brands come out ahead. While a fair amount of market share is changing hands because of barriers, only three brands see a net gain.

Cost, guidelines, and market access have the greatest impact. Barriers related to these factors affect more prescriptions than any others.

Eliminating barriers would tighten up the market, knocking the top 3 brands down a bit and pushing the bottom 4 brands up—mostly at the expense of “other” brands.

“Other” brands win big. In aggregate, other brands (not surveyed) see largest barrier-related share gain—more than twice as much as any surveyed brand.

Europe less active than the US. Only one of the seven surveyed brands is prescribed more in the EU5 countries.

Top 3 brands are the same in Europe and the US. Endocrinologists in both markets most often prescribe the same three leading brands.

Market Access Impact: GHD explores key issues affecting Growth Hormone 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 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 melanoma in total in the last month

We conducted the survey between May 6th and 10th, 2016.

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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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