

Market Access Impact: Growth Hormone Deficiency (US)

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Abstracts

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

Market barriers affect nearly 40% of growth hormone prescriptions in the US, and most brands lose market share because of them.

But one brand has turned those barriers to its advantage, boosting its net share by more than 5% to claim the #2 spot.

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 two leading brands take the bulk of Genotropin's lost market share?

Humatrope (somatropin; Eli Lilly): What's the one surveyed brand that's more easily reimbursed than Humatrope?

Norditropin (somatropin; Novo Nordisk): Which competitor could threaten

Norditropin if it can manage to overcome market barriers?

NutropinAq (somatropin; Genentech): Is cost or limited availability costing NutropinAq more market share?

Omnitrope (somatropin; Sandoz): Omnitrope and NutropinAq are running neck and neck for market share. Which one would pull ahead if market barriers didn't exist?

Saizen (somatropin; EMD Serono): Which two market barriers do fewer doctors experience with Saizen than any other brand?

Zomacton (somatropin; Ferring): Zomacton loses share to both Genotropin and Humatrope. Which one does it also take share from?

Top Takeaways

Market access is the issue in the US. Barriers related to market access affect more than twice as many prescriptions as all other barriers combined.

One brand wins big. Of the two brands that gain share due to market barriers, one gains more than three times as much as the other.

Eliminating barriers would shake up the market, knocking the 2nd place brand down to 3rd place and widening the gap between the current 4th and 5th place brands.

Two brands facing awareness issues. Nearly 20% of doctors surveyed are not aware of the two least-prescribed brands. Awareness for the other five brands is high.

"Other" brands benefit too. Six of the surveyed brands see a net share loss to other brands (not surveyed). In aggregate, these brands see the second largest barrier-related share gain.

US somewhat more active than Europe. US endocrinologists prescribe all but one of the surveyed brands more often than their European counterparts do.

Top 3 brands are the same in US and Europe. 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 100 adult and paediatric endocrinologists in the US, 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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