

# Market Access Impact: HIV (EU5) 2018

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## Abstracts

Market barriers affect just over a tenth of HIV prescriptions. Is your brand losing out?

In EU5 markets, where market barriers affect just over one in 10 HIV prescriptions, no single brand has a significant lead over other brands. Market share for all players is up for grabs! Find out what's driving share gains, and what your brand can do to level the playing field in Market Access Impact: HIV (EU5) [2018].

Based on a survey of 150 infectious disease specialists from the EU5 markets (France, Germany, Italy, Spain, UK), the report covers 11 major therapies from Gilead, ViiV, Merck Sharp & Dohme, BMS and Janssen Cilag. Handy graphs and charts reveal which of the 7 different barriers cost your brand the most market share, and which ones help you take the most from competitors.

### Top Takeaways

Barriers affect just over one in 10 prescriptions: But is it cost, formulary issues or some other barrier combinations that cause the most amount of pain?

Seven brands gain share due to barriers: But no single brand has a significant lead. Could this mean market share is up for grabs? How could you exploit this and gain share for your brand?

Two brands see a significant loss: These brands lose over 1% market share because of barriers. Why? And can this be prevented? Eliminating barriers would have the most impact at the bottom of the table: Removing barriers wouldn't change the top of the table, but brands in the lower half of the table could benefit. Is your brand in a position to gain market share?

Two brands have a perception problem: Between 20-23% of surveyed doctors would not prescribe these brands, leaving other brands to capture market share.

### Insight into 11 Major HIV Drugs

Atripla (efavirenz/emtricitabine/tenofovir disoproxil fumarate; Gilead)

Descovy (emtricitabine/tenofovir alafenamide; Gilead)

Genvoya (cobicistat/elvitegravir/emtricitabine/tenofovir alafenamide; Gilead)

Odefsey (emtricitabine/rilpivirine/tenofovir alafenamide; Gilead)

Triumeq (abacavir/dolutegravir/lamivudine; ViiV Healthcare)

Tivicay (dolutegravir; ViiV Healthcare)

Isentress (raltegravir; Merck Sharp & Dohme)

Edurant (rilpivirine; Janssen Cilag)

Prezista (darunavir; Janssen Cilag)

Reyataz (atazanavir; Bristol-Myers Squibb)

Rezolsta (darunavir/cobicistat; Janssen Cilag)

### Exploring Market Access Barriers

Market Access Impact: HIV (EU5) explores key issues affecting HIV 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 infectious disease specialists—30 from each EU5 country (France, Italy, Germany, Spain, UK)—chosen from the largest community of validated physicians in the world. All respondents have:

All respondents:

Have been practicing for 2+ years

Prescribed at least one of the listed products

Seen at least 5 patients in total in the last month

We conducted the survey between March 5-12, 2018.

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