

# Market Access Impact: Myeloma (EU5)

<https://marketpublishers.com/r/MDD6124E7C4EN.html>

Date: September 2016

Pages: 0

Price: US\$ 4,995.00 (Single User License)

ID: MDD6124E7C4EN

## Abstracts

Market barriers affect nearly 20% of myeloma prescriptions. Is your brand losing market share?

We surveyed 150 European oncologists and haematologists to find out how market barriers affect the way they prescribe 8 myeloma drugs. The results show that half of those treatments lose market share overall while the other half make small net gains.

Find out why, and learn what your brand can do to regain lost share, in Market Access Impact: Myeloma (EU5).

The report covers major brands from Amgen, BMS/AbbVie, Celgene, Johnson & Johnson, and Novartis. You'll discover which brands see the biggest gains and losses from 7 different market barriers, which barriers help and hurt your brand the most, and which competitors you take share from and lose it to.

### Top Takeaways

Half of brands are widely prescribed: Around 70% or more of the doctors surveyed prescribe 4 of the 8 brands covered. Over 90% of doctors prescribe the top brand.

Half of the surveyed brands gain share: The four most prescribed brands all see small barrier-related net increases, but the most prescribed brand gains nearly twice as much as any other.

The top barrier affects two brands disproportionately: Significantly more doctors experience this barrier with two of the least prescribed brands.

“Other” brands also gain: They take share from all of the surveyed brands, and in aggregate, see the third-largest net share gain.

Eliminating barriers would affect the middle of the market: Two middle-ranking brands would switch places, and the aggregate of “other” brands would move down the rankings.

Market access affects more prescriptions than other barriers: Taken together barriers related to market access drive a third of barrier-related prescription decisions.

## Insight into 8 Major Myeloma Drugs

Darzalex (daratumumab; Johnson & Johnson)

Empliciti (elotuzumab; BMS/AbbVie)

Farydak (panobinostat; Novartis)

Imnovid (pomalidomide; Celgene)

Kyprolis (carfilzomib; Amgen)

Revlimid (lenalidomide; Celgene)

Thalomid (thalidomide; Celgene)

Velcade (bortezomib; Johnson & Johnson)

## Exploring Important Market Access Issues

Market Access Impact: Myeloma explores key issues affecting Myeloma 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? %li%What do they prescribe instead?

Which competing brands does your brand take market share from?

A Report Based on Expert Knowledge

A We surveyed 150 medical oncologists and 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 practicing for 2+ years

Prescribed at least one of the listed products

Seen at least 5 patients with multiple myeloma in total in the last month

We conducted the survey between September 5th and 8th, 2016.

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## Contents

- 1. WHAT ARE THE MARKET BARRIERS**
- 2. ABOUT THIS REPORT**
- 3. ABOUT THE SURVEY**
- 4. BRANDS INCLUDED IN THE SURVEY**
- 5. EXECUTIVE SUMMARY**

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