

# Market Access Impact: Renal Cell Carcinoma (EU5) 2018

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## Abstracts

Market barriers affect 14 percent of RCC prescriptions in Europe. Is your brand losing out?

Despite market barriers only affecting 14 percent of all renal cell carcinoma (RCC) prescriptions in Europe, certain brands are losing on market share. Is it yours? Find out what's driving share gains, and what your brand can do to level the playing field in Market Access Impact: RCC (EU5) [2018]. Based on a survey of 150 medical oncologists, the report covers 10 major therapies from Novartis, Roche, Ipsen, Pfizer, Exelixis, Amgen, Bayer, and BMS. 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 14 percent of all prescriptions. Small, perhaps, but brands are still losing out on market share opportunities because of them. Is it cost, formulary issues or some other barrier combinations that cause the most amount of pain?

Four brands see robust share increases. Is this lead too big for the chasing pack to overcome? Is your brand leading, or are you in the chasing pack?

One brand sees a significant loss. Perhaps due to limited prescribing, but other issues could be at play. What are these issues, and what can be done about them?

Eliminating barriers would close the gap mid-table. Due to the overall barrier impact being below 10 percent, changes at the top and bottom of the table won't be seen if

barriers are eliminated; not so mid-table, where changes would be seen.

Perception is not the problem. But perhaps a willingness to use is? Between 17-21 percent of physicians would not consider using 3 brands? Is your brand in the mix?

### Insight into 10 Major RCC Treatments

Afinitor (everolimus; Novartis)

Avastin (bevacizumab; Roche)

Cabometyx (cabozantinib; Exelixis/Ipsen)

Inlyta (axitinib; Pfizer)

Kispix (lenvatinib; Eisai)

Nexavar (sorafenib; Bayer)

Opdivo (nivolumab; Bristol-Myers Squibb)

Sutent (sunitinib; Pfizer)

Torisel (temsirolimus; Pfizer)

Votrient (pazopanib; Novartis)

### Exploring Important Market Access Issues

Market Access Impact: Renal Cell Carcinoma (EU5) explores key issues affecting RCC 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?

## Contents

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