

Market Access Impact: Type 2 Diabetes Mellitus [Orals] (EU5) 2018

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Abstracts

Market barriers affect a fifth of oral diabetes treatment prescriptions in Europe. Is your brand losing out?

Market barriers affect over a fifth of all oral type 2 diabetes mellitus (T2DM) prescriptions in Europe, and certain brands are losing out on market share big time. 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: Type 2 Diabetes Mellitus (Orals) (EU5) [2018].

Based on a survey of 150 European diabetologists from the leading EU5 markets (France, Germany, Italy, Spain, and the UK), the report covers 9 major oral therapies from AstraZeneca, Eli Lilly, Boehringer Ingelheim, Janssen Cilag, Merck Sharp & Dohme, and Takeda. 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 a fifth 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?

One brand sees a robust share increase. Is this lead too big for the chasing pack to overcome? Is your brand leading, or are you in the chasing pack?

Two brands see a significant loss. Could market share losses be due to low

prescribing rates, or is some other market dynamic at play? And perhaps most importantly, can this be prevented?

Eliminating barriers would have limited impact. Due to the overall barrier impact being 20 percent, eliminating barriers would have limited impact on market share performance.

Perception is a huge problem. Across all but one of the brands, a certain proportion of physicians have never heard of the treatment. Could improved physician education be the key to better market shares?

Insight into 9 Oral Type 2 Diabetes Mellitus Treatments

Forxiga (dapagliflozin; AstraZeneca)

Glyxambi (empagliflozin/linagliptin; Eli Lilly/Boehringer Ingelheim)

Invokana (canagliflozin; Janssen Cilag)

Januvia (sitagliptin; Merck Sharp & Dohme)

Jardiance (empagliflozin; Eli Lilly/Boehringer Ingelheim)

Onglyza (saxagliptin; AstraZeneca)

Qtern (saxagliptin/dapagliflozin; AstraZeneca)

Trajenta (linagliptin; Eli Lilly/Boehringer Ingelheim)

Vipidia (alogliptin; Takeda)

Exploring Market Access Barriers

Market Access Impact: Type 2 Diabetes Mellitus [Orals] (EU5) explores key issues affecting type 2 diabetes mellitus 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 diabetologists and primary care physicians—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 with type 2 diabetes mellitus in total in the last month

We conducted the survey between April 5-10, 2018.

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