

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

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## Abstracts

Market barriers only affect over a third of oral diabetes treatment prescriptions in the US. Is your brand losing out?

Market barriers affect over a third of all oral type 2 diabetes mellitus (T2DM) prescriptions in the US, 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) (US) [2018].

Based on a survey of 100 diabetologists, the report covers 9 major oral therapies from AstraZeneca, Eli Lilly, Boehringer Ingelheim, Johnson & Johnson, Merck & Co., 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 over a third of all prescriptions. Some brands are making hay, while others are losing market share, big time. Is your brand a leader or laggard? And is it cost, formulary issues or some other barrier combinations that cause the most amount of pain?

One brand sees the biggest share increase. Is its lead too big to overcome? What can other brands do to catch up?

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 close gaps throughout the table. Such is the impact of barriers in the US, eliminating barriers would drive change across all brands. Will your brand experience an increase in market share in a barrier free world?

Perception could be the the problem. For three of the brands included in the survey, between 6-21 percent of physicians have never heard of them. And what does this tell you about how physicians are being educated about treatment options?

### Insight into 9 Oral Type 2 Diabetes Mellitus Treatments

Farxiga (dapagliflozin; AstraZeneca)

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

Invokana (canagliflozin; Johnson & Johnson)

Januvia (sitagliptin; Merck & Co.)

Jardiance (empagliflozin; Eli Lilly/Boehringer Ingelheim)

Nesina (alogliptin; Takeda)

Onglyza (saxagliptin; AstraZeneca)

Qtern (saxagliptin/dapagliflozin; AstraZeneca)

Tradjenta (linagliptin; Eli Lilly/Boehringer Ingelheim)

### Exploring Market Access Barriers

Market Access Impact: Type 2 Diabetes Mellitus [Orals] (US) [2018] 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 100 US-based diabetologists and primary care physicians, 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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