

# Market Access Impact (US) [Haemophilia A]

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## Abstracts

Losing share to competitors? Understanding market barriers can help close the gap

Haemophilia A treatment is a highly competitive market in the US, where half of the 8 brands we surveyed have nearly equal market share. Understanding the market barriers that prevent doctors from prescribing your brand is essential if you want to build a lasting competitive advantage.

Learn how 7 barriers affect your market share, see who you take share from, and who gets your lost share in Market Access Impact: Haemophilia A (US).

Based on a survey of 100 US-based haematologists, the report covers 8 major therapies from Bayer, Bioverativ/Biogen, CSL Behring, Novo Nordisk, Pfizer, and Shire.

### Top Takeaways

Barriers affect over a quarter of prescriptions: The two biggest barriers are responsible for more than a third of that impact.

The barrier effect is split evenly: Half of the surveyed brands lose share because of barriers, the other half gain.

Not all brands are widely prescribed: Most brands are prescribed by two thirds of doctors or less. However, most doctors are willing to consider brands they don't prescribe.

Barriers have the biggest impact on the middle of the market: Eliminating them would push the 4th place brand down to 6th place, and bump the 5th and 6th place brands up by one spot.

Barriers aren't a problem for all doctors all the time: For the most part, fewer than 20% of doctors experience any one barrier with a given brand.

Cost is a huge problem for one brand: Roughly 30% of doctors experience cost barriers with this brand. That's nearly 10% more than any competitor.

## Insight into 8 Major Haemophilia A Drugs

Advate (octocog alfa, Antihemophilic Factor [human]; Shire)

Eloctate (efmoroctocog alfa; Bioverativ/Biogen)

Feiba (Anti-Inhibitor Coagulant Complex; Shire)

Helixate FS (octocog alfa; CSL Behring)

Humate-P (Antihemophilic Factor/von Willebrand Factor Complex [human]; CSL Behring)

Kogenate FS (octocog alfa; Bayer)

NovoEight (turoctocog alfa; Novo Nordisk)

Xyntha (moroctocog alfa; Pfizer)

## Exploring Market Access Barriers

Market Access Impact: Haemophilia A (US) explores key issues affecting 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 haematologists, 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 haemophilia A in total in the last month

We conducted the survey between May 2nd and 10th, 2017.

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