

Market Access Impact (US) [MS]

<https://marketpublishers.com/r/M0EA1F0DE31EN.html>

Date: June 2017

Pages: 0

Price: US\$ 5,145.00 (Single User License)

ID: M0EA1F0DE31EN

Abstracts

New products suffer from market access barriers, as established therapies reap the spoils

Despite prescribing rates for many of the leading treatments for multiple sclerosis in the US being healthy, market barriers affect nearly 1 in 5 prescriptions. This isn't all bad news for some brands, but others are losing out on market share gains. One of the new kids on the block could get a market share bump of over 100% if neurologists could prescribe it instead of its competitors.

Market Access Impact: Multiple Sclerosis (US) shows you how 7 barriers affect your market share, revealing how much you win and lose, who you take share from, and who gets your lost share.

Based on a survey of 100 US-based neurologists, the report covers 12 major therapies from Genzyme, Biogen, Bayer, Teva, Sanofi, Novartis, Roche, EMD Serono, and AbbVie/Biogen.

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Top Takeaways

Barriers affect just under 20% of prescriptions. The three biggest barriers that account for over half of this impact are a mix of market access and patient related barriers.

One brand sees an impressive market share gain. Patient-preference plays a significant role in this gain, suggesting other treatments just aren't meeting the mark.

Most brands gain: 7 out of the 12 surveyed brands see a net market share gain, with many of these gains modest to almost non-existent.

Lots of brands are widely prescribed. 8 out of 12 brands are prescribed by over three quarters of neurologists, and many of them are also willing to consider brands they don't prescribe.

Time on market and safety seem to drive the number of barriers experienced per brand. New arrivals and treatments which have poor safety profiles experience the most barriers, with one of these experiencing 4 separate barriers.

Awareness is good for all brands. Very few neurologists haven't heard of the brands we surveyed, but 'willingness to try' data might be surprising for some brands.

Insight into 12 Major Asthma/COPD Drugs

Aubagio (teriflunomide; Sanofi)

Avonex (interferon beta-1a; Biogen)

Betaseron (interferon-beta-1; Bayer)

Copaxone (glatiramer acetate; Teva)

Gilenya (fingolimod; Novartis)

Lemtrada (alemtuzumab; Genzyme)

Ocrevus (ocrelizumab; Roche)

Plegridy (peginterferon beta-1a; Biogen)

Rebif (interferon beta-1a; EMD Serono)

Tecfidera (dimethyl fumarate; Biogen)

Tysabri (natalizumab; Biogen)

Zinbryta (daclizumab; AbbVie/Biogen)

Exploring Market Access Barriers

Market Access Impact: Multiple Sclerosis (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 neurologists, 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 asthma and/or COPD in total in the last month

We conducted the survey between July 3rd and 13th, 2017.

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