

Exploring the Perceived Value of Fixed-Dose Combinations in Type 2 Diabetes Mellitus in the EU4 and the UK

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OBJECTIVES

Fixed-dose combinations (FDCs) are expected to simplify therapy and improve adherence in managing T2DM by combining multiple medications into a single pill. The objectives of the study are:

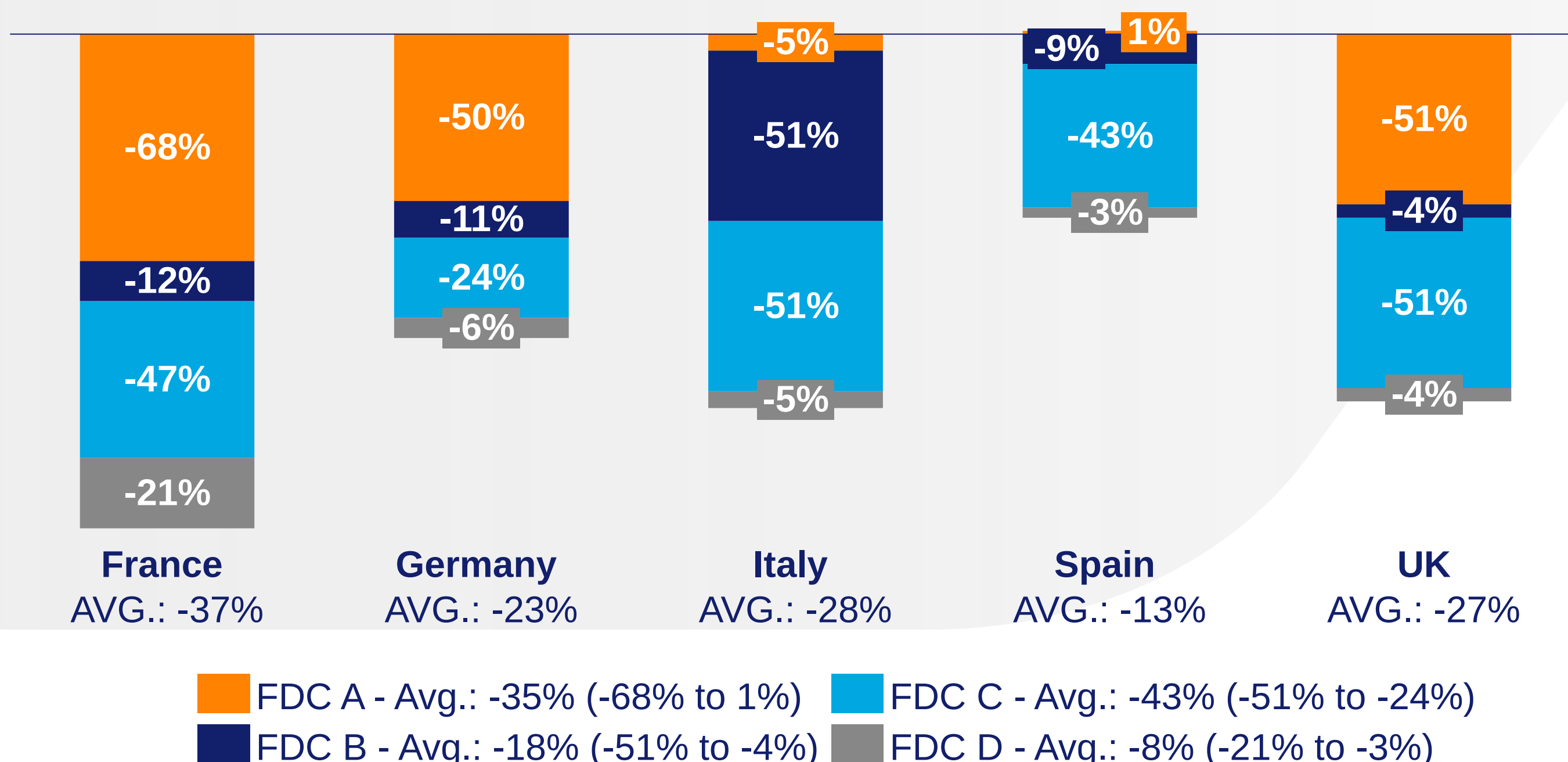
- > Explore how FDCs are valued relative to their mono-components.
- > Investigating the correlation between price changes of FDCs for T2DM vs. the sum of the mono-components (1+1) and the subsequent market share dynamics in the EU4 and the UK from 2018 to 2022.



RESULTS

- > The pricing and market dynamics of FDCs for T2DM vary discreetly across European countries. Ranging from -13% in Spain to -37% in France.
- > The **average price difference in 2022** between the FDC and the 1+1 for **FDC-A was -35%** (68% to 1%), for **FDC-B -18%** (-51% to 4%), for **FDC-C -43%** (-51% to -24%), and for **FDC-D -8%** (-21% to -3%).

Price Difference for the FDC-A, B, C and D in the EU4 and the UK

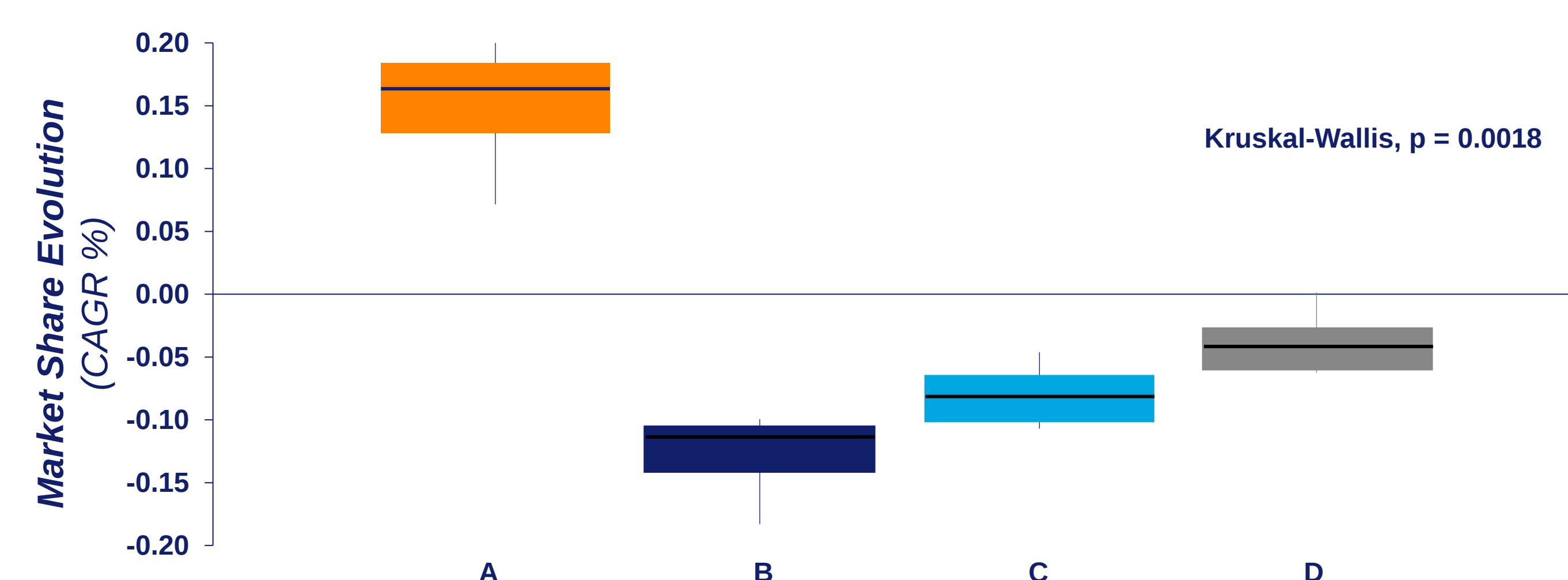


METHODOLOGY

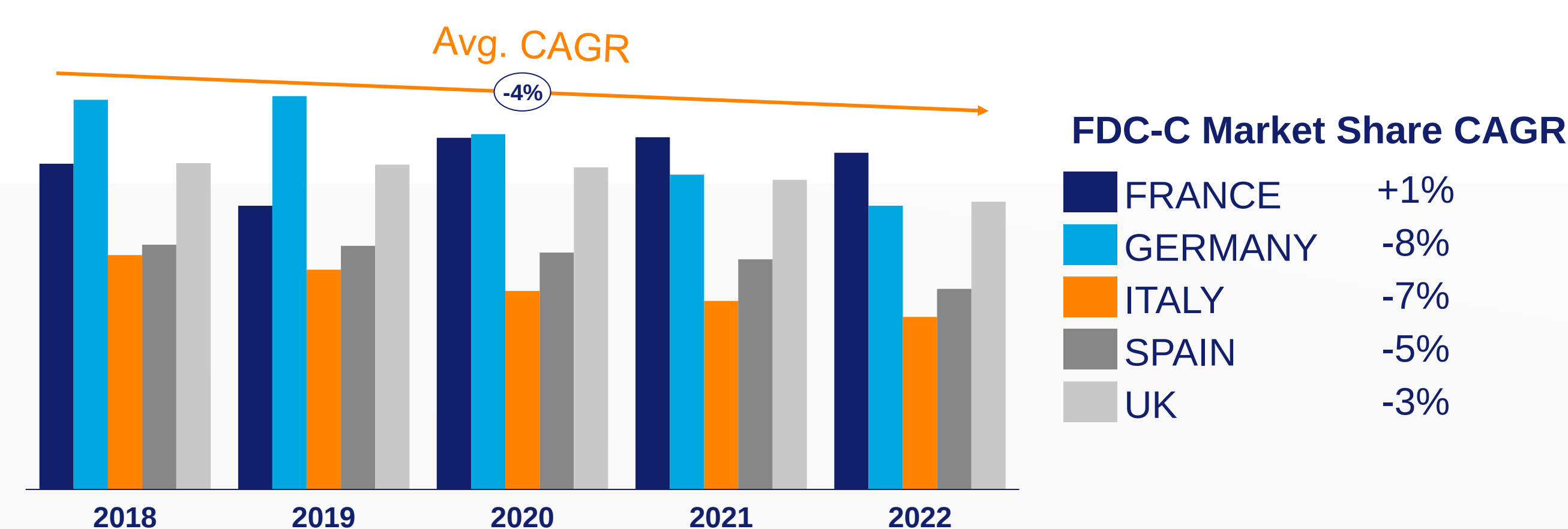
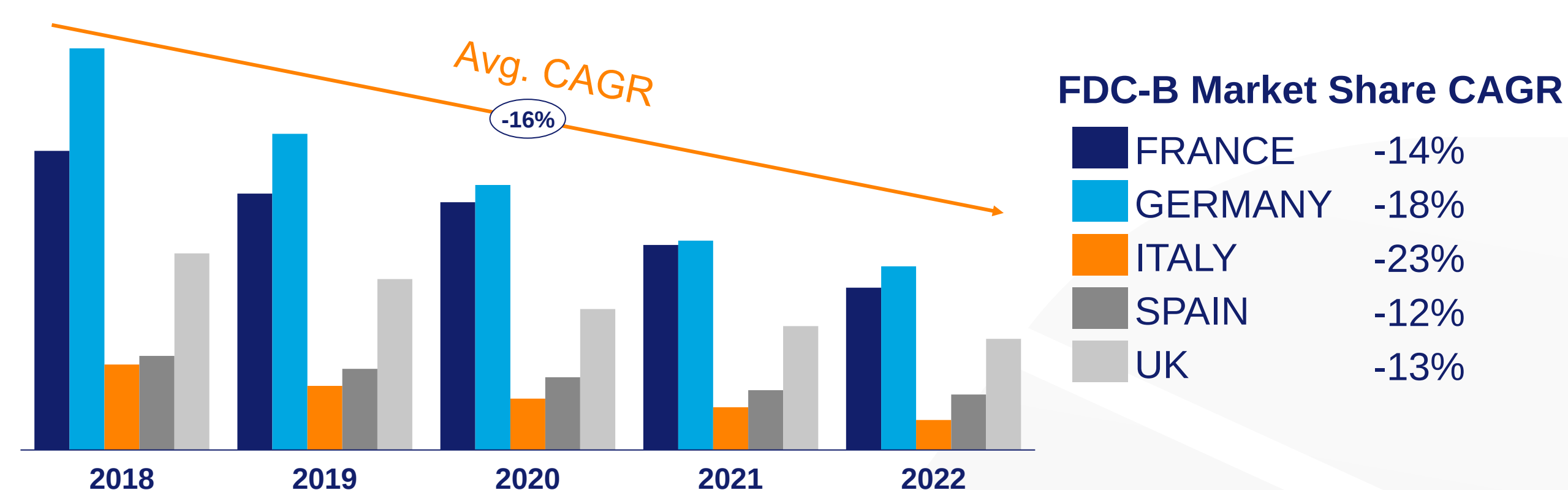
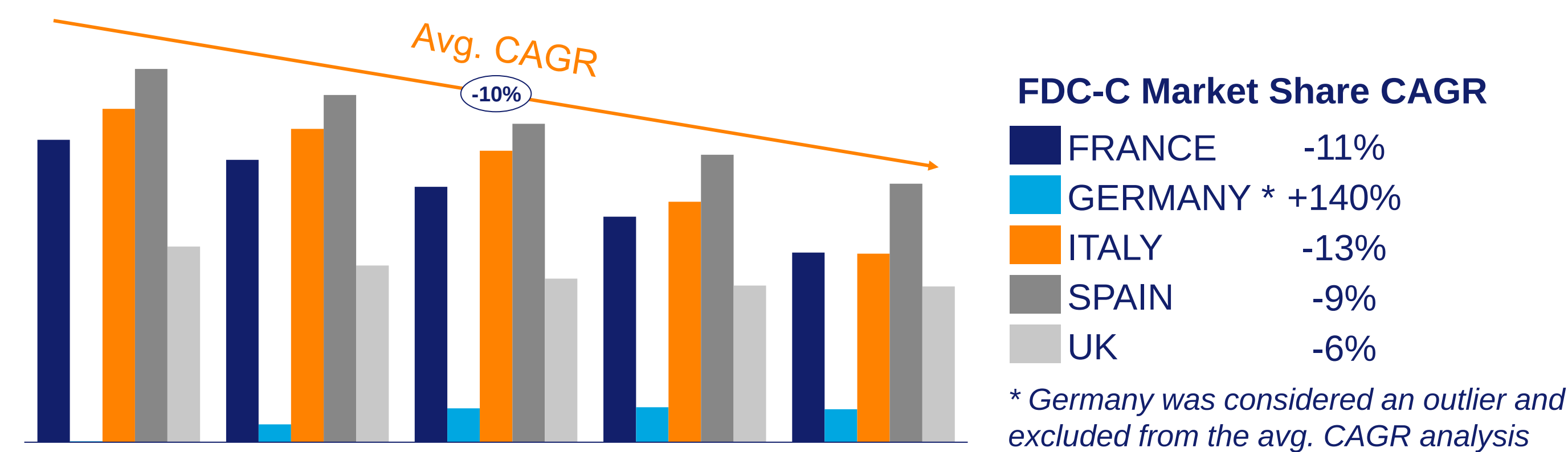
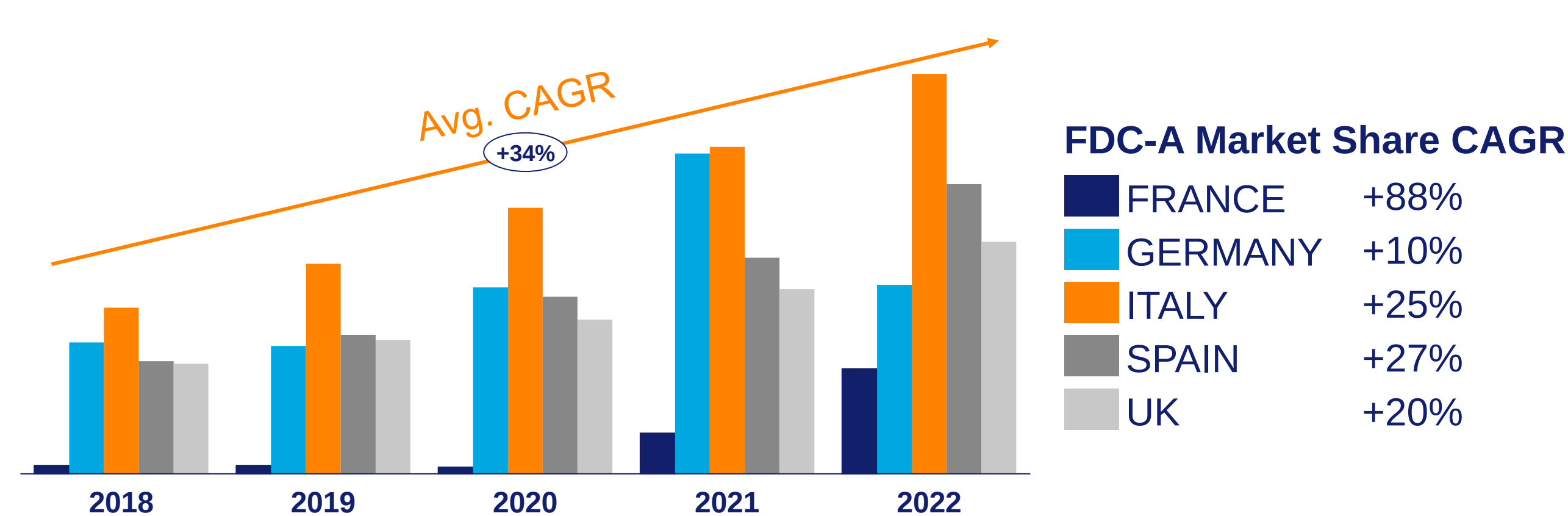
- > Four FDCs consisting of metformin + dapagliflozin (A), saxagliptin (B), vildagliptin (C) and sitagliptin (D) were analyzed. The price differential and price evolution between the FDCs with 1+1, and the relationship between these pricing factors and market share trends from 2018 to 2022 were examined to determine the perceived value of each FDC.

- > There was **no statistical significance in the price difference evolution** among the 4 FDCs in the EU4 + UK ($p=0.7961$).
- > There is a **statistically significant in the market share evolution** among the 4 FDCs in the EU4 + UK ($p=0.0018$).

Market Share Evolution for the FDC-A, B, C and D in the EU4 and the UK



- > **FDC-A gained market share in all five countries** regardless of price difference vs. the 1+1. **FDC-B lost market share in every country** despite being cheaper than the 1+1 in three out of five countries. **FDC-C and D lost market share in 4 out of 5 countries** even though they were always cheaper than the 1+1.



CONCLUSION

- > The **moderate market share of 3 out of 4 FDCs** between 2018 to 2022, indicates that **among physicians there might be a low awareness** of the benefits of **improving adherence and simplified therapy** with price also playing a role, although not significant. The study does not account for important factors like clinical efficacy, safety, patient preferences, physician prescribing habits, and patient-level data, which could significantly impact FDC adoption and market dynamics.



REFERENCES

- Navlin Prices for France, Germany, Italy, Spain and the UK extracted the 10/05/2023
- IQVIA market share data extracted the 10/05/2023



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