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Diabetes - KOL Insight and Consensus Outlook Modules

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Abstracts

The medium term: battle lines are drawn

The fundamental drivers of the global diabetes market are strong and continue to fuel growth. Rising levels of obesity and disease prevalence in both established and emerging markets have seen the sector return a 5 year compound annual growth rate (CAGR) of 12% over to reach US$31.9 billion in 2012. It is estimated that 347 million people have the disease – 90% of whom are Type II diabetes sufferers – and this figure could almost double by 2030.

The big four companies in diabetes - Novo Nordisk, Sanofi, Eli Lilly and Merck – are locked in a battle of supremacy which is set to continue over the medium term. While Novo Nordisk currently leads the pack, Sanofi is close behind. With Novo Nordisk's approval of Tresiba (insulin degedec) stalled in the US over safety concerns, Sanofi latest version of Lantus U300 (insulin glargine)) could capitalise. Bristol Myers-Squibb and AstraZeneca are just two of the other players set to increase their sales significantly in this busy market place by 2017.

The diabetes market will continue on an upward trajectory, and an estimated 5 year CAGR of 11 percent will see the sector top US$54 billion – the question is which companies will have a slice to this market, and how big will it be?

What's in the pipeline?

Finding market voice for new products in diabetes depends critically on price and differentiation. Cost of treatment is already an issue and resistance can be expected from health payers if new products offer only marginal therapeutic or patient

management benefits. For example, excitement about Sanofi's U300 (insulin glargine) is because it shows differentiation to Lantus with “peakless” delivery and longer duration. Eli Lilly’s weekly dose dulaglutide may offer advantages over other launched and pipeline GLP-1 products such as such as GSK’s Eperzan (albiglutide) and BMS/AZ/Amylin’s Bydureon (exanatide) but meaningful advantages need to be shown for success in the market.

What the Future Holds: is there a Game Changer on the Horizon?

Don’t expect a revolution in diabetes treatment soon. New products coming to market are essentially incremental improvements over current approaches, with better safety profiles and geared to improving patient compliance.

The real prize will be for the company that can bring a paradigm shift to the treatment of diabetes. Upsetting the status quo will require a fundamentally different approach - and some of these developments threaten the diabetes drugs manufacturers existing revenues.

Among the developments to be aware of are the threat of biosimilars, the development of an artificial pancreas 'closed loop' system, the wide implementation of which would be a doomsday development for drugs companies, and a DNA reverse vaccine for which early clinical results have shown promising results.

A Complete Ongoing Analysis of Current Trends, Future Forecasts and Landscape Modifiers For instant access to an accurate, unbiased, qualitative review of the latest treatment trends along with a five-year quantitative diabetes market forecast look no further than FirstWord’s Therapy Trends: Diabetes. This comprehensive FirstWord research is available in two comprehensive modules:

The KOL Insight: Diabetes module provides a complete review and is enhanced with exclusive in-depth interviews with leading KOLs from the US and Europe

TThe Consensus Outlook: Diabetes data analysis module provides annual historical and forecast product-level sales data from an average of leading equity analysts’ projections

KOL Insight

Therapy Trends KOL Insight: Diabetes analyses the current and predicted key issues, current products and late-stage pipeline products. The report gives you qualitative, inside information from exclusive FirstWord interviews with 12 key opinion leaders (KOLs) through the following:

KOL Insight Report — an in-depth analytical report on diabetes treatment trends

Full report updates — issued to you after each and every significant diabetes market event

Event Bulletins — the latest KOL views in response to each event

Key Report Features and Benefits

Critical insights on products and market developments from leading US and European clinicians

Complete coverage of all sub sectors - Basal, Prandial and Premixed insulins, DPP-IV inhibitors, GLP-1 agonists/analogues, SGLT-2 inhibitors, Thiazolidinediones and other non insulin anti diabetics

Assessment of current leading diabetes products by sub sector

Analysis of late-stage pipeline diabetes therapies by sub sector

Competitive evaluation of leading players

Current thinking and trends in the treatment of diabetes

Predicted KOL treatment trends and market leaders

Ongoing FirstWord clinical and market updates

Expert Opinion for Real World Insights

The data and analysis in the report is enriched through the specific insights and opinions of leading clinicians working in diabetes in the US and Europe. Their views on specific drugs and treatment pathways provide a unique front line perspective from those working in clinical setting. The results of these detailed and extensive interviews are incorporated though out the text so they can be read in the context of the issue or product being discussed.

US KOLs

Dr Elif Oral, MD, Associate Professor of Endocrinology, University of Michigan, Ann Arbor, MI.

Dr Sonal Singh, MD, MPH, Assistant Professor, Division of General Internal Medicines, John Hopkins University, Baltimore, MD.

Dr Carol Wysham, MD, Clinical Associate Professor of Medicine, Division of General Internal Medicines, University of Washington School of Medicine, Washington.

Dr Joel Zonszein, MD, Director of the Clinical Diabetes Center at the University Hospital Albert Einstein College of Medicine, a Division of Montefiori Medical Center, NY.

Requested anonymous, Associate Professor of Medicine, Endocrinology and Metabolism, Duke University, Durham, NC.

European KOLs

Professor Bernard Charbonnel, MD, Professor of Endocrinology and Metabolic Diseases, University of Nantes; Head of the Internal Medicine, Endocrinology and Diabetes Department, Hôtel Dieu, University Hospital of Nantes, France.

Professor Melanie Davies, MD, Honorary Consultant, Diabetes, University Hospital Leicester, Leicestershire, UK.

Professor Marc Donath, MD, Director, Endocrinology, Diabetes and Clinical Nutrition, University Hospital, Basel, Switzerland.

Professor Baptist Gallwitz, MD, Professor, Professor of Medicine, Diabetes, Eberhard Karls University, University Hospital of Tuebingen, Germany.

Professor Jens Holst, MD, Professor of Medical Physiology, Department of Biomedical Sciences; Director of the Research Cluster for Diabetes and Obesity; Vice Chairman, Faculty of Health Sciences, University of Copenhagen, Denmark.

Professor Michael Nauck, MD, Head, Diabeteszentrum Bad Lauterberg, Harz, Germany.

Professor John Wilding, MD, Head of the Department of Obesity and Endocrinology, University of Liverpool, UK.

Key Quotes from the Report

"I like Janumet. I get a much more effective medication even in one pill a day using combination therapy. Janumet has this long acting glycol, so it is long acting. In early diabetes, together with lifestyle changes, I often use a combination of DPP-IV with metformin, either once or twice a day because it doesn't cause hypoglycaemia. The patients don't need to monitor their blood sugar three, four, five times a day. They don't get admitted to the hospital with hypoglycaemia so the side effects are low. So I start treating these patients with a combination therapy, like Janumet." Dr Joel Zonszein (US)

"I think lots of people use Kombiglyze because it improves compliance so it makes sense. In the therapeutic armamentarium it's the only real once daily combination." Professor Sonal Singh (US)

"In terms of efficacy, side effects, convenience and device, Victoza is the preferred GLP-1. If I look at the new-starts, probably 60 percent of people are going for the Victoza" Dr Carol Wysham (US)

"The prevention of hypoglycaemia is a very important aim for the classical drugs and an unmet need. We should be searching for alternatives to insulin." Professor Baptist Gallwitz (EU)

"I am not too optimistic that you can improve DPP-IV inhibitors to be more efficacious. You may well be able to improve GLP-1 agonists to have more efficacious drugs that have less side effects based on the variety within the class that we have seen until now. I think that the pharmaceutical industry as a whole is a little bit running out of ideas, so we really need to identify good targets.” Professor Michael Nauck (EU)

“I think if someone came up with a reasonably well-tolerated drug that helped you lose weight [and] that you only had to take once a month or once a year? Everyone would be on that. US Key Opinion Leader

“Our local insurance company have taken all of what they consider tier 3 drugs, and they include all the GLP-1 agents including the DPP-IV inhibitors, and just put them on a 50-percent co-pay. Fifty percent of a lot of money is still a lot of money.” Dr Carol Wysham (US)

KOL Insights - Key Topics

Current diabetes marketplace

Epidemiology

Aetiology

Diagnosis

Current treatment landscape

Reimbursement of key diabetes brands

Current marketed therapies

Pipeline therapies

Unmet needs

Current treatment algorithm

Future treatment algorithm

Future developments in Diabetes

Consensus Outlook

Use this detailed report and powerful interactive Excel spreadsheet to compare and contrast companies and products now and in the future. Therapy Trends Consensus Outlook: Diabetes includes the following comprehensive resources:

An in-depth forecast report based on consensus figures from 13 leading analysts. Rich in tables and charts, the report maps the impact of future events to predict product and company performance

An interactive forecast data analysis spreadsheet comparing critical market parameters including market size, product sales, market shares and competitive status over the period 2007 to 2017

Timely event-driven market forecast report and data analysis updates over 12 months

Report features:

Historical diabetes sales from 2007–2012

Forecast diabetes sales from 2013-2017

Key competitors and drug developers

Current and late-stage pipeline drugs

Future event mapping to forecast data points

Expected impacting factors on global forecasts

Use Consensus Outlook to:

Chart predicted market growth and product sales

Map your own market parameters

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Tailor your strategic and investment focus

Assess your current and future sales resources

Set proactive launches and branding strategies

Analysts compared:

Barclays Capital

Credit Suisse

Deutsche Bank

Goldman & Sachs

International Strategy & Investment

Jefferies

JP Morgan

Merrill Lynch

Morgan & Stanley

Societe Generale

Stifel Nicolaus

UBS

Wells Fargo

Content Highlights and Products Covered:

Research Methodology

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Diabetes Marketplace

Key Diabetes Developers

Diabetes Class Dynamics

Lantus (insulin glargine; Sanofi) forecast

Levemir (insulin detemir; Novo Nordisk) forecast

Tresiba (insulin degludec; Novo Nordisk) forecast

Ryzodeg (degludecPlus; Novo Nordisk) forecast

NovoRapid/NovoLog (insulin aspart; Novo Nordisk) forecast

Humalog (insulin lispro; Eli Lilly) forecast

Apidra (insulin glulisine; Sanofi) forecast

NovoMix/NovoLog Mix (insulin aspart + insulin aspart protamine; Novo Nordisk) forecast

Januvia franchise (sitagliptin; Merck & Co) forecast

Galvus franchise (vildagliptin; Novartis) forecast

Onglyza franchise (saxagliptin; Bristol-Myers Squibb/AstraZeneca/ Otsuka) forecast

Nesina franchise (alogliptin; Takeda) forecast

Tradjenta franchise (linagliptin; Boehringer Ingelheim/Eli Lilly) forecast

Byetta (exenatide; Bristol-Myers Squibb/AstraZeneca/Amylin) forecast

Bydureon (exenatide once-weekly; Bristol-Myers Squibb/AstraZeneca/ Amylin) forecast

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Victoza (liraglutide; Novo Nordisk) forecast

Lyxumia (lixisenatide; Sanofi) forecast

Invokana (canagliflozin; Johnson & Johnson/Mitsubishi Tanabe) forecast

Forxiga (dapagliflozin; Bristol-Myers Squibb/AstraZeneca) forecast

Actos (pioglitazone; Takeda) forecast

U300 (insulin glargine; Sanofi) forecast

LY2605541 (insulin peglispro; Eli Lilly) forecast

LY2963016 (biosimilar insulin glargine; Eli Lilly/Boehringer Ingelheim) forecast

IDeglira (liraglutide + insulin degludec; Novo Nordisk) forecast

Afrezza (Technosphere Insulin; MannKind Corporation) forecast

FIAsp (insulin aspart; Novo Nordisk) forecast

Eperzan (albiglutide; GlaxoSmithKline/Human Genome Sciences) forecast

LY2189265 (dulaglutide; Eli Lilly) forecast

BI-10773 (empagliflozin; Boehringer Ingelheim/Eli Lilly) forecast

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