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Physician Views: A Victoza competitor in waiting? – Can Eli Lilly's dulaglutide make an impact in the GLP-1 agonist market?

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Abstracts

Last week, Eli Lilly confirmed that in the head-to-head AWARD-6 study its experimental GLP-1 agonist dulaglutide demonstrated 'non-inferiority' to Novo Nordisk's market-leading Victoza brand.

Dulaglutide is the first alternative drug in the GLP-1 class to demonstrate this. Coupled with a once-weekly dosing profile (Victoza is dosed once daily), analysts have speculated that Eli Lilly's drug could gain sizeable market share once available (its approval in the US market is anticipated in Q3).

Predicting an accurate view of future market dynamics remains difficult at this point, however, particularly as Eli Lilly has only 'top-lined' the AWARD-6 data.

In a note to investors published on Monday, for example, Bernstein's Ronny Gal postulated that lack of disclosed numerical HbA1c reduction data may point towards 'negative results' for dulaglutide; a view perhaps shared by Novo Nordisk investors who drove the company's share price to a record high on the day that Eli Lilly's data were published (Gal also cautions, however, that Eli Lilly rarely provides additional data when it reveals provisional study data).

Another key metric that will determine the commercial profile of dulaglutide, speculate analysts, will be its weight-loss profile, which in conjunction with an easy-to-use pen device and once-weekly dosing is almost certain to drive uptake.

To ascertain how important a role weight-loss profile will play in driving usage of dulaglutide, US-based endocrinologists being polled by FirstWord this week will

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be given three hypothetical scenarios to evaluate and asked to determine to what (peak) percentage of eligible GLP-1 agonist patients they would expect to prescribe a once-weekly product with comparable efficacy to Victoza (i.e. dulaglutide) if that product had:

A comparable weight-loss profile;

A superior weight-loss profile; or

An inferior weight-loss profile.

In addition, endocrinologists are being polled on what proportion of patients they would anticipate prescribing Victoza to (assuming future peak penetration rate) in a situation whereby dulaglutide had successfully launched and demonstrates a comparable weight-loss profile to Novo Nordisk's drug (in addition to comparable efficacy and once-weekly versus once-daily dosing).

Lastly, we are asking endocrinologists for their view on whether availability of a product possessing dulaglutide anticipated characteristics can grow the GLP-1 agonist market, which is currently worth around $3 billion globally (of which Victoza commands an approximate two-thirds share).

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