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Physician Views: Can Movantik revolutionise the opioid-induced constipation market?

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Abstracts

It has been an eventful year for players operating in the US opioid-induced constipation (OIC) market. In June, the FDA recommended against requiring cardiovascular outcomes studies for all products within the peripherally-acting mu-opioid receptor antagonist (PAMORA) class, and in September approved AstraZeneca and Nektar Therapeutics' Movantik, the first PAMORA product that is dosed orally (ViewPoints: Is AstraZeneca's motivation key to Movantik's commercial success?).

Those with marketed products (Cubist and Salix Pharmaceuticals), and those with compounds in development (such as Theravance, Develco Pharma and Ironwood Pharmaceuticals), will be watching the performance of Movantik, which is due to launch early next year, closely. Not only could oral dosing drive market share gain for Movantik, but approval brings Big Pharma to the OIC commercial arena.

Deciphering the commercial opportunity is one that analysts are yet to agree on fully. Current consensus sales for Movantik in 2020 stand at around $290 million, according to Bloomberg. However, a handful of analysts expect revenues nearer the $500 million mark by the end of the decade.

The bull argument is supported in part by the size of the potential market; an estimated 70 million people worldwide are prescribed opioids for pain, of whom around 80 percent suffer constipation. Furthermore, there is a suggestion that only around 50 percent then gain some benefit from laxatives. In addition, Movantik should enjoy a two to three year head start as the only once-daily, oral PAMORA drug indicated for OIC.

A more bearish view of the market opportunity is shaped in part by retained concerns around cardiovascular safety (despite the FDA's decision not to require full outcomes

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studies) and the likelihood that payers may require eligible patients to be treated with laxatives prior to receiving Movantik.

Poll Questions

To better ascertain how this market may develop, FirstWord is this week polling US-based general practitioners and gastroenterologists about the OIC market and the entry of an oral, once-daily product. Specifically we are asking them...

Their assessment of the level of unmet need for OIC among patients with chronic non-cancer pain?

What percentage of OIC patients currently progress beyond treatment with laxatives (i.e. are prescribed or should be prescribed a specific therapy indicated for OIC)?

How significant the availability of an oral, once-daily OIC therapy will be?

How significant a role will the side-effect profile of OIC therapies (i.e. cardiovascular risk) limit their usage of these products?

To what percentage of eligible OIC patients they would expect to prescribe naloxegol 12 months after launch?

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