

Physician Views: Will next-generation long-acting insulins prove compelling?

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Abstracts

In the second of two diabetes-focused Physician Views polls being run by FirstWord Pharma PLUS this week (see also Physician Views: What opportunity for biosimilar basal insulin?), we are polling US and EU5-based endocrinologists to gauge their assessment of new long-acting insulins developed by Novo Nordisk (Tresiba), Sanofi (Toujeo) and Eli Lilly (Peglispro).

These newer products are poised to play a key role in how the multi-billion dollar basal insulin segment evolves over the next decade. They will dictate market share dynamics for their developers and should contribute to insulating the branded segment from loss of market share to biosimilar/generic versions of Sanofi's market-leading Lantus (expected to launch in the EU in 2015 and the US from 2016). This second issue appears particularly pertinent given the feedback we received earlier this week from endocrinologists, who appear very comfortable with the concept of prescribing biosimilar/generic Lantus (Physician Views Poll Results: What opportunity for biosimilar basal insulin?).

The significance of these newer products has also increased in light of Sanofi's recent disclosure that Lantus sales will be flat next year (due most likely to greater rebating with payers) and the potential leverage their availability will have on increased price compression in the market, alongside the subsequent launch of biosimilar/generic Lantus products. Concurrently, increasing efforts by payers to negotiate greater discounts could adversely impact the launch trajectories of these newer brands, argue some analysts, who cite only incremental improvement over currently available basal insulins.

Poll Questions

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How these products are differentiated from Lantus and Novo Nordisk's marketed Levemir franchise, and how they are differentiated from each other is at the crux of forecasting their commercial outlook and the questions we are asking as part of this Physician Views poll. Specifically we are asking US and EU5-based endocrinologists...

Based on your knowledge of clinical data for newer long-acting insulins (Sanofi's Toujeo, Novo Nordisk's Tresiba and Eli Lilly's Pglispro), how would you describe the level of improvement these products broadly provide over currently-available therapies?

Overall, do you think these newer long-acting insulins demonstrate sufficient efficacy (i.e. hypoglycaemia) and convenience benefits (i.e. reduced daily dosing) to warrant premium pricing versus Sanofi's Lantus?

Which of these newer long-acting insulins do you think offers the most compelling improvement over existing therapies?

What is the primary factor for you selecting that product?

Returning to the key theme in Q1 (how would you describe the level of improvement these products broadly provide over currently available therapies), what 'bar to entry' do you broadly expect newer branded long-acting insulins to raise for biosimilar Lantus? (US respondents assume that biosimilar Lantus is NOT rated as interchangeable)

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