

Targeted Therapies in Asthma: KOL Insight [2018]

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Abstracts

Can new biologics breathe fresh competition into the targeted asthma treatment landscape?

The severe asthma treatment landscape is evolving. Near-term debates will focus on how best to use currently approved treatments, including Xolair, Nucala and Cinqair/Cinquaero, and which treatments offer the best for patients. Visible on the horizon is another anti-IL-5 mAb, AstraZeneca's Fasenra (benralizumab), and by all accounts KOLs believe it could take the market by storm. Longer-term, Xolair biosimilars are looking large in the minds of KOLs, as are next-generation biologics such as AstraZeneca/Amgen's tezepelumab, and an anti-TSLP mAb currently in mid-stage testing but already generating highly compelling data.

Learn how the world's leading asthma KOLs see the market evolving, how current products can protect market share, and how developers can differentiate their pipeline therapies in KOL Insight: Targeted Therapies in Asthma. Ten North American and European KOLs provide their insight on 3 marketed products and 10 pipeline programmes.

Take a tour of the report now

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See the therapies covered >

Find out who the 6 EU & 4 US KOLs are >

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Top takeaways

Will Xolair (omalizumab) remain the treatment of choice for allergic asthma patients? Xolair may remain first-line-therapy for allergic asthma patients with elevated serum IgE levels, but for some patients other treatment options might be a better strategy. Moreover, omalizumab biosimilars are on the horizon. Find out what KOLs think about biosimilars, and how Xolair's position in the treatment paradigm could change.

What have been the key changes to the anti-IL-5 mAb landscape, and how do KOLs see this class evolving? Nucala (mepolizumab) was the first mAb to receive approval for severe asthma in over a decade, but other anti-IL5 mAbs are gaining traction. Of these, KOLs are most excited about AstraZeneca's Fasenra (benralizumab). Find out what's exciting KOLs, and what companies behind currently marketed anti-IL-5s can do to protect market share.

What pipeline programmes are KOLs particularly excited about? Regeneron/Sanofi's anti-IL-4/IL-13 mAb, dupilumab, is emerging as a potentially new treatment option for severe asthma, but its another pipeline programme that KOLs are raving about. Is it AstraZeneca/Amgen's tezepelumab? Novartis' fevipiprant? Or something else? Read the report to find out more.

What's the future of biomarkers in identifying responsive patients? With precision medicine becoming a critical enabler of product use in a number of disease areas, find out what KOLs think about the use of biomarkers in defining eligible patient populations in the severe asthma market and how this could help eliminate "trial and error" approaches to treatment decisions.

With increasing number of biological therapies coming to market in the medium term, what will it take to succeed in the targeted asthma market? Competition for a limited pool of patients could eventually make the targeted asthma treatment landscape a less commercially attractive option for manufacturers developing new therapies in this field. What commercial strategies are KOLs advocating?

As simple as strategic pricing, or are other strategies needed?

Quotes

"It's got some advantages because it's got this unique mechanism of action, it's different. So there's a story you can build on." European Key Opinion Leader

"The thing about the anti-TSLP is that it's further up the food chain in the inflammatory cascade and it may, potentially, make the other compounds redundant. So I think it's very promising." US Key Opinion Leader

Sample of therapies covered

Marketed/Registered Therapies

Xolair (omalizumab; Roche/Novartis)

Nucala (mepolizumab; GSK)

Cinqair/Cinqaero (reslizumab, Teva)

Pipeline/Pre-Registered Therapies

Benralizumab (anti-IL-5; AstraZeneca)

Fevipirant (anti-CRTh2; Novartis)

Tralokinumab (anti-IL13; AstraZeneca)

Dupilumab (anti-IL-4/IL-13; Sanofi/Regeneron)

Risankizumab (anti-IL-23; Boehringer Ingelheim/AbbVie)

Tezepelumab (anti-TSLP; AstraZeneca/Amgen)

Xmab 7195 (anti-IgE/CD32b; Xencor)

Bertilimumab (anti-CCL11 chemokine; Immune Pharmaceuticals)

REGN 3500 (anti-IL-33; Sanofi/Regeneron)

FB 825 (Anti-C α mX; Fountain Biopharma)

KOLs interviewed

KOLs from North America

Dr Leonard B. Bacharier MD, Professor of Pediatrics and Clinical Director, Division of Allergy, Immunology and Pulmonary Medicine at Washington University School of Medicine in St. Louis, USA

Dr Mark J. Fitzgerald MD, Director at the Centre for Heart and Lung Health at Vancouver Coastal Health Research Institute, Vancouver, Canada

Dr Mike E. Wechsler MD, MMSc, Associate Physician, Brigham and Women's Hospital, Assistant Professor of Medicine, Harvard Medical School, Boston, MA, USA

Dr Mitchell Grayson MD, Nationwide Children Hospital's Chief of the Division of Allergy and Immunology for The Ohio State University Department of Pediatrics, Columbus, Ohio, USA

KOLs from Europe

Professor Arnaud Bourdin, MD, Head of General Pneumology, CHU de Montpellier, Montpellier, France

Professor Andy Wardlaw, MD, Head of Department and Professor of Respiratory Medicine, Glenfield Hospital, Leicester, UK

Professor Kian Fan Chung, MD, Professor of Respiratory Medicine, Royal Brompton Hospital, London, UK

Professor Peter J Barnes, MD, Professor of Thoracic Medicine and Head of

Respiratory Medicine at the National Heart and Lung Institute and Honorary Consultant Physician at Royal Brompton Hospital, London, UK

Anonymous German KOL, Professor at a leading university in Germany specialising in asthma and respiratory medicine

Anonymous German KOL, Professor at a leading university in Germany specialising in asthma, pulmonary medicine and critical care

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FirstWord Reports deliver timely, need-to-know intelligence about your products, your competitors and your markets. Covering biosimilars, market access, medical affairs, sales & marketing, technology and therapy areas, FirstWord Reports provide expert views and intelligence on the challenges facing pharma today.

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