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Type 2 Diabetes Mellitus: Update Bulletin #2 [March 2018]

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Abstracts

This edition presents the views and insights from three world leading key opinion leaders (KOLs) from North America and Europe on a variety of recent events in the type 2 diabetes mellitus (T2DM) market, including; the European Commission's approval of Novo Nordisk's Ozempic (semaglutide), a once-weekly GLP-1 receptor agonist, for T2DM; The US FDA approval of Merck & Co's Steglatro (ertugliflozin), an oral SGLT2 inhibitor, and the fixed-dose combination Steglujan (ertugliflozin) and DPP-4 inhibitor (sitagliptin) for T2DM; and Sanofi announcing its long-acting insulin glargine therapy Toujeo, is on par with Novo Nordisk's Tresiba (insulin degludec) in the head-to-head BRIGHT study in patients with T2DM.

Business Questions:

On current evidence, will Ozempic's incremental efficacy benefits over Trulicity be enough to significantly change treatment practices within the GLP-1 receptor agonist class?

How important will CVOT data be, which will be reading out for Trulicity and Ozempic in the near future?

What evidence will GLP-1 receptor agonists need to show to continue to move up the T2DM treatment pathway?

Are Steglatro and Steglujan sufficiently differentiated from their marketed competitors and where will they fit in the treatment pathway?

How concerned are KOLs over the potential for serious side-effects with

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Steglatro and Steglujan?

What evidence will be required to increase utilisation of the SGLT2 inhibitors?

What are the key barriers to use of the SGLT2 inhibitor/DPP-4 inhibitor fixed-dose combinations?

According to the KOLs, what factors are most important to the success of the Steglatro and Steglujan franchise?

Is the BRIGHT study likely to alter long-acting insulin prescribing behaviour?

What factors are likely to impact the decision to use Toujeo?

Are biosimilars a threat to Toujeo and Tresiba?

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