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Glucagon-Like Peptide-1 (GLP-1) Receptor Agonists - A Target Pipeline and Stakeholder Analysis 2012

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Abstracts

This report “Glucagon-Like Peptide-1 (GLP-1) Receptor Agonists - A Target Pipeline and Stakeholder Analysis 2012” published in March 2012 provides a compilation of business, commercial, clinical and scientific information about GLP-1 receptor agonists. A comprehensive analysis of the state of the art and key trends guides the reader through this emerging antidiabetic drug class. Scientific and technological approaches as well as molecules in the target pipeline of GLP-1 receptor agonists are described and assessed. A critical appraisal of the clinical results of advanced GLP-1 receptor agonist projects and products is provided..

Scope of the report

Commercial experience with incretin-based therapeutics

Monthly treatment costs of GLP-1R agonists

Physician preferences and priorities for GLP-1R agonists

GLP-1R agonist market drivers and restraints

Unmet needs and differentiation between GLP-1R agonists

Valuation of GLP-1R agonist programs by business transactions

Next-to-market GLP-1R agonists

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Once-daily subcutaneous GLP-1R agonists

Long-acting subcutaneous GLP-1R agonists

Non-invasive peptide GLP-1R agonists

Oral small molecule GLP-1R agonists

Combinatgion and dual target Glucagon/GIP and GLP-1R agonists

Although the first glucagon-like peptide-1 receptor (GLP-1R) agonist was already approved in 2005, it was the launch of the once daily GLP-1R agonist Victoza from Novo Nordisk in 2010 which boosted the market size to US$ 1.7 bln in 2011. Victoza became a blockbuster in its second year on the market. The unique feature of weight reduction associated with the use GLP-1R agonists clearly differentiates this antidiabetic drug class from other established antidiabetics. The profound blood glucose lowering effect without significant hypoglycemia made GLP-1R agonists to a strongly emerging antidiabetic drug class. Gastrointestinal side effects such as nausea, vomiting and diarrhea seem to be associated with the pharmacologic effect of GLP-1R agonism.

The clinically and commercially validated target makes GLP-1 attractive for follow-on molecules with improved properties. Analysis of the GLP-1R agonist pipeline revealed in addition to the three approved and marketed GLP-1R agonists (Byetta, Victoza and once-weekly Bydureon) 66 R&D projects including eight life cycle versions. The vast majority of new GLP-1R agonists are designed to have improved features which mainly are based on convenience (less frequent administration or non-invasive/oral administration). Molecules with less frequent subcutaneous administration make out the majority (33) with 13 projects in clinical phases II or III, while 18 R&D projects are directed to non-invasive or oral administration of GLP-1R agonists with only one program in phase II. A strongly emerging third cluster of novel GLP-1 R agonists is that of GLP-1R agonists in combination with insulin at a fixed ratio and of co-agonists or dual targeting molecules, i.e. GLP-1R agonists which also act at the receptor of glucagon (mostly) or GIP.

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