Product Profiles: Insulin Antidiabetics – Key Developers Compete for Basal Insulins Market

Description:
In-depth analysis of key insulin brands and pipeline agents indicated for the treatment of type 1 and type 2 diabetes. Provides a comparative evaluation of clinical and commercial drug attributes to determine competitiveness in the marketplace.

The basal insulins are the most successful insulin class, with other insulin classes demonstrating high substitution or low and declining sales. Current basal insulins offer good safety and emerging therapies are not expected to improve efficacy significantly. However, the launch of two late-stage pipeline products Degludec and DegludecPlus in 2012–13 will alter market dynamics.

Scope
- Understand Datamonitor’s independent appraisal of marketed insulin brands and key pipeline agents indicated for treating type 1 and type 2 diabetes.
- Illustrate how pipeline and marketed insulins compare to one another in terms of clinical and commercial attributes.
- Review important clinical developments for key pipeline agents with analysis of the latest clinical trial data.
- Understand how marketed insulin brands are positioned in the diabetes treatment algorithm and how they are perceived by prescribers.
- Determine to what extent future insulin therapies satisfy the main clinical unmet needs in the treatment of type 1 and type 2 diabetes.

Highlights
- With strong marketing and sales resources committed by Novo Nordisk, late-stage basal insulin Degludec (insulin degludec) will offer strong competition to class leader Lantus (insulin glargine; Sanofi) and largely cannibalize predecessor Levemir (insulin detemir; Novo Nordisk).

- Key patents for blockbuster Lantus will expire from 2014–15. However, the threat of biosimilar insulin is expected to have less impact than typical small molecule generics, as physicians are expected to be reluctant to introduce potential additional variability into patients’ insulin treatment regimens.

- Novo Nordisk, Sanofi, and Eli Lilly are also the only companies with promising insulin products in late stage development. Alternative insulin delivery mechanisms under development, such as MannKind’s Afrezza (inhaled insulin), are not expected to make it to market in the near term.

Reasons to Purchase
- What is the gold-standard basal insulin for diabetes?
- How are marketed brands positioned in the insulin antidiabetics treatment algorithm?
- Which are the most likely insulin antidiabetics to emerge from the pipeline and how will they impact the way diabetes is managed?
- What are the comparative strengths and weaknesses of the key insulin antidiabetics and pipeline insulin candidates?

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