Diabetes: Battle for Ascendancy Escalates in Expanding Market – KOL Insight

Description: Diabetes is one of the few disease areas that has retained its market value despite the entry of generics, the rise in drug prices and prevalence of the disease has allowed drug sales to soar to a worldwide value of $34.1 billion in 2012. While barriers to entry remain high with added scrutiny over cardiovascular and other safety risks, evident by Tresiba's (insulin degludec; Novo Nordisk) recent US failure, the exponential market growth makes diabetes one of the most attractive opportunities in Pharma.

Competition in the major drug segments are intense with Sanofi's basal insulin Lantus (insulin glargine), Novo’s prandial insulin NovoRapid/NovoLog (insulin aspart), Merck's DPP-IV Januvia (sitagliptin), and Novo's GLP-1 Victoza (liraglutide) leading the way in their respective classes with best in class efficacy and safety. In addition to these clinical advantages, more convenient administration devices and strong marketing has helped them stand out from the competition.

While Novo Nordisk, Sanofi and Merck look set to protect their franchises with exciting pipeline therapies, Key Opinion Leaders interviewed note that there are a number of unmet needs in diabetes treatment and management. Companies that can address these needs and differentiate their products from existing players will see significant traction in this lucrative indication. This is evident from the successful launches of the novel SGLT-2 inhibitors- Invokana (canagliflozin; Johnson & Johnson/Mitsubishi Tanabe) and Forxiga (dapagliflozin; Bristol-Myers Squibb/AstraZeneca), in the US and EU. In addition, therapies showing significant incremental advances also have potential to usurp market share from the gold standard treatments.

‘Therapy Trends: Diabetes’ is compiled from exclusive, in-depth interviews with the world’s leading Key Opinion Leaders in diabetes. It identifies and analyses the major factors, advances and trends currently influencing the diabetes treatment landscape. The report focuses on late-stage pipeline products, and how these could modify future Diabetes management.

The authors selected the KOLs for this Therapy Trends report based on their level of engagement and influence within the diabetes disease area, and their scientific standing and clinical experience. The unique KOL scoring system identifies those thought leaders with the greatest insight into how diabetes clinical research will shape the future market.

Understand the Unique Benefits of KOL Insight: Diabetes

Diabetes: Battle for ascendency escalates in expanding market examines the most prominent insights gained from the field’s key opinion leaders. The results of this research and analysis will help you to:

- Comprehend the current trends driving and shaping the global diabetes market
- Understand the future landscape and how new drug classes will fit into the treatment algorithm
- Compare and contrast the clinical profile of the insulins, DPP-IV, GLP-1 and SGLT-2 classes and assess their competitive strengths and weaknesses
- Assess the commercial and clinical potential of the next generation pipeline drugs, biosimilars, and existing therapies.
- Appreciate KOL calls for novel therapies and understand the commercial threat and opportunity for current products.
- Develop positioning strategies based on KOL insight
- Identify critical areas of unmet clinical need and opportunities for better disease management
- Evaluate the performance of companies with the most robust new product pipelines
- Recognise the key factors KOLs predict will drive future treatment trends

Understand the global diabetes market

The diabetes market is one of the most lucrative markets for the pharmaceutical industry, with a large growing patient population, significant unmet need and a dynamic pipeline. Although treatment will not be revolutionised by the new therapies, there will be incremental advantages, with more efficacious and safer therapies entering the defined disease classes. Twelve KOLs from North America and Europe provide answers to some critical questions regarding the global diabetes market, including:
- How might new therapies impact on the current first-line treatments?
- What are the current unmet needs and major challenges in diabetes treatment?
- What are the most promising late-stage classes in development?
- Which therapies are KOLs eagerly awaiting?
- How will the new therapies be positioned against each other in each of the disease segments?
- In what ways could players improve on existing therapies and what impact could this have on prescribing?
- How will treatment of diabetes look in the future?
- How do KOLs think the pricing environment is shaping the uptake of new diabetes treatments?
- What clinical research trends do KOLs predict for future diabetes therapies?

An approach backed by unrivalled knowledge

This report provides a qualitative overview of the current and future diabetes market. Information was gathered from telephone interviews held with twelve key opinion leaders (KOLs), from across the major diabetes markets, including France, Germany, Italy, the UK and the US. These regions were selected because they contain many of the largest global markets for the pharmaceutical industry, and also influence the dynamics of Pharma markets in other countries.

In order to critically select Key Opinion Leaders (KOLs) a number of parameters were considered including their clinical experience, scientific publications, involvement with Pharma, involvement in clinical trials, and record of presenting at high profile international conferences.

Subjects covered in the interviews included future diagnostic and therapeutic strategies for diabetes, the future of diabetes drug classes, and new drugs entering the market. These leading KOLs also gave their views on current research, the usefulness of existing diabetes drug classes, the cost of newer drugs and other concerns in the therapy area.

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