Description: The “Non-Insulin Therapies for Diabetes: GLP-1 Agonists, DPP4 Inhibitors and SGLT2 Inhibitors, 2016-2026” report provides a comprehensive analysis of the current market landscape of these therapies and an informed opinion on how the market is likely to evolve over the next decade. The anti-diabetic drugs market broadly comprises of insulin and non-insulin therapies.

Non-insulin therapies are further classified under various categories based on their respective mechanisms of action. Of the different types of non-insulin therapies, GLP-1 agonists, DPP4 inhibitors and SGLT2 inhibitors have been the most popular in the last few years. As mentioned earlier, these therapeutic classes have captured the attention of a number of pharmaceutical companies and drug developers worldwide.

Several companies, including pharmaceutical giants, mid-sized players and start-ups, have come up with innovative technologies and novel formulations of these drug classes. Such advances have generated and sustained significant momentum in this segment of the industry.

Specifically, GLP-1 agonists, which have been researched for several years, have a rich pipeline of clinical and preclinical molecules. DPP4 inhibitors currently have a relatively larger market share; however, they are now giving way to other relatively newer and emerging classes such as SGLT2 inhibitors.

During the course of our study, we identified over 80 molecules belonging to these three drugs classes. More than 70% of the candidates are currently under clinical / preclinical development; the efforts are actively being led by several companies. Focused primarily on these three classes of drugs, this report features:

- An overview of the market landscape highlighting important details on each molecule such as key players, current phase of product development, route of administration and dosage regime.
- Detailed profiles of drugs that have been recently approved / marketed or are in the late stages of development.
- A list of key opinion leaders (KOLs) who were involved in the discovery and development of GLP-1 agonists, DPP4 inhibitors and SGLT2 inhibitors.
- An analysis of recently published clinical trial data depicting the prevalent trends and technical developments that have taken place in the industry.
- A discussion on the potential side effects and warnings issued by regulatory authorities suggesting areas of improvement / guidance for future drug development.
- A list of upcoming non-insulin novel therapies that are currently in early stages of development and likely to become a part of the anti-diabetic drugs market in the near future.

The report also provides an estimate of the likely future size of the non-insulin therapies for diabetes. Our forecast model was built based on an understanding of the existing market trends and likely future opportunities for GLP-1 agonists, DPP4 inhibitors, SGLT2 inhibitors and other non-insulin anti-diabetic drug classes. We have provided informed estimates of the expected future sales of marketed and late stage product candidates under each category, highlighting their share in the overall market over the next ten years.

The research, analysis and insights presented in this report are backed by a deep understanding of key insights gathered from both secondary and primary research. Actual figures have been sourced and analyzed from publicly available data. Unless otherwise specified, all financial figures are presented in USD.

Chapter Outlines

Chapter 2 is an executive summary of the insights captured in our research. The summary offers a high level view on the likely evolution of GLP-1 agonists, DPP4 inhibitors and SGLT2 inhibitors during the coming decade.
Chapter 3 provides a general introduction to diabetes and discusses associated symptoms, available diagnostic methods and tests, and other complications associated with the condition. It also includes a detailed classification of the various therapeutic interventions available for the treatment of diabetes. These include both insulin based and non-insulin therapies. The chapter also provides brief descriptions of their respective mechanisms of action.

Chapter 4 provides a comprehensive overview of the market landscape of GLP-1 agonists, DPP4 inhibitors and SGLT2 inhibitors. It includes information on over 100 different molecules that fall under these classes of drugs. Some of these are already approved and are available in different regions across the globe. The rest are currently in various stages of preclinical / clinical development. The chapter presents analysis of the molecules based on their current phase of development, the various routes of administration being considered for their systemic delivery, dosage frequency, type of molecule and key players involved in developing these molecules.

Chapter 5 contains detailed profiles of recently approved and late stage GLP-1 agonists. Each profile covers information on several aspects of these drugs such as their history of development, clinical trial results, dosage form and regime, recent sales of the product (for marketed drugs), the current status of development, and the collaborations and partnerships that have been inked related to that particular drug / drug candidate.

Chapter 6 contains detailed profiles of recently approved and late stage DPP4 inhibitors. Each profile covers information on several aspects of these drugs such as their history of development, clinical trial results, dosage form and regime, recent sales of the product (for marketed drugs), the current status of development, and the collaborations and partnerships that have been inked related to that particular drug / drug candidate.

Chapter 7 contains detailed profiles of recently approved and late stage SGLT2 inhibitors. Each profile covers information on several aspects of these drugs such as their history of development, clinical trial results, dosage form and regime, recent sales of the product (for marketed drugs), the current status of development, and the collaborations and partnerships that have been inked related to that particular drug / drug candidate.

Chapter 8 focuses on the various side effects reported by patients treated using these drugs. It includes detailed discussions on the potential complications that may arise upon using these drugs, and the warnings issued by the FDA and other regulatory bodies regarding the associated risks. In addition, the chapter lists the various GLP-1 agonists, DPP4 inhibitors and SGLT2 inhibitors that have been terminated during development due to various reasons.

Chapter 9 provides a brief introduction to other novel interventions that are currently being investigated as potential treatment options for diabetes. The chapter also includes an analysis of these novel therapeutic options based on the type of molecule being investigated and phase of development.

Chapter 10 provides a detailed analysis on the likely future size of the non-insulin therapies market over the next decade. It presents comprehensive forecast scenarios for each individual drug class mentioned in the report, namely GLP-1 agonists, DPP4 inhibitors, SGLT2 inhibitors and other non-insulin anti-diabetic drugs.

Chapter 11 presents an analysis of the Key Opinion Leaders (KOLs) in this domain. It contains schematic representations of world maps highlighting the geographical locations of these eminent scientists / researchers. The chapter presents a detailed 2X2 analysis to assess the relative experience of certain KOLs based on the number of clinical studies they participated in and the highest phase of development they investigated.

Chapter 12 provides a detailed analysis of recently published clinical data on GLP-1 agonists, DPP4 inhibitors and SGLT2 inhibitors. It identifies various aspects of the ongoing research and presents analysis highlighting the active drugs, study focus areas and clinical endpoints (safety / efficacy / tolerability / pharmacodynamics / pharmacokinetics) across the published data.

Chapter 13 is a collection of interview transcripts of the discussions we held with key stakeholders in the industry.

Chapter 14 summarizes the entire report. The chapter presents a list of key takeaways and offers our independent opinion on the current market scenario and evolutionary trends that are likely to determine the future of this segment of the industry.
Chapter 15 is an appendix, which provides tabulated data and numbers for all the figures in the report.

Chapter 16 is an appendix, which contains the list of companies and organizations that have been mentioned in the report.

Research Methodology

The data presented in this report has been gathered via secondary and primary research. For all our projects, we conduct interviews with experts in the area (academia, industry, medical practice and other associations) to solicit their opinions on emerging trends in the market. This is primarily useful for us to draw out our own opinion on how the market may evolve across different regions and technology segments. Wherever possible, the available data has been checked for accuracy from multiple sources of information.

The secondary sources of information include:

- Annual reports
- Investor presentations
- SEC filings
- Industry databases
- News releases from company websites
- Government policy documents
- Industry analysts’ views

While the focus has been on forecasting the market over the coming ten years, the report also provides our independent view on various technological and non-commercial trends emerging in the industry. This opinion is solely based on our knowledge, research and understanding of the relevant market gathered from various secondary and primary sources of information.

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