

NEW YORK, Oct. 3, 2013 /PRNewswire/ -- Reportlinker.com announces that a new market research report is available in its catalogue:

Diabetes – KOL Insight and Consensus Outlook Modules http://www.reportlinker.com/p01658957/Diabetes---KOL-Insight-and-Consensus-Outlook-Modules.html#utm_source=prnewswire&utm_medium=pr&utm_campaign=Pathology

The medium term: battle lines are drawn The fundamental drivers of the global diabetes market are strong and continue to fuel growth. Rising levels of obesity and disease prevalence in both established and emerging markets have seen the sector return a 5 year compound annual growth rate (CAGR) of 12% over to reach U
S\$31.9 billion
in 2012. It is estimated that 347 million people have the disease – 90% of whom are Type II diabetes sufferers – and this figure could almost double by 2030.

The big four companies in diabetes - Novo Nordisk, Sanofi, Eli Lilly and Merck – are locked in a battle of supremacy which is set to continue over the medium term. While Novo Nordisk currently leads the pack, Sanofi is close behind. With Novo Nordisk's approval of Tresiba (insulin degludec) stalled in the US over safety concerns, Sanofi latest version of Lantus U300 (insulin glargine) could capitalise. Bristol Myers-Squibb and AstraZeneca are just two of the other players set to increase their sales significantly in this busy market place by 2017.

The diabetes market will continue on an upward trajectory, and an estimated 5 year CAGR of 10% will see the sector top US\$53 billion – the question is which companies will have a slice to

this market, and how big will it be?

What's in the pipeline? Finding market voice for new products in diabetes depends critically on price and differentiation. Cost of treatment is already an issue and resistance can be expected from health payers if new products offer only marginal therapeutic or patient management benefits. For example, excitement about Sanofi's U300 (insulin glargine) is because it shows differentiation to Lantus with "peakless" delivery and longer duration. Eli Lilly's weekly dose dulaglutide may offer advantages over other launched and pipeline GLP-1 products such as such as GSK's Eperzan (albiglutide) and BMS/AZ/Amylin's Bydureon (exanatide) but meaningful advantages need to be shown for success in the market.

What the Future Holds: is there a Game Changer on the Horizon? Don't expect a revolution in diabetes treatment soon. New products coming to market are essentially incremental improvements over current approaches, with better safety profiles and geared to improving patient compliance.

The real prize will be for the company that can bring a paradigm shift to the treatment of diabetes. Upsetting the status quo will require a fundamentally different approach - and some of these developments threaten the diabetes drugs manufacturers existing revenues.

Among the developments to be aware of are the threat of biosimilars, the development of an artificial pancreas 'closed loop' system, the wide implementation of which would be a doomsday development for drugs companies, and a DNA reverse vaccine for which early clinical results have shown promising results.

A Complete Ongoing Analysis of Current Trends, Future Forecasts and Landscape

Modifiers For instant access to an accurate, unbiased, qualitative review of the latest treatment trends along with a five-year quantitative diabetes market forecast look no further than FirstWord's Therapy Trends: Diabetes. This comprehensive FirstWord research is available in two comprehensive modules:

- The KOL Insight: Diabetes module provides a complete review and is enhanced with exclusive in-depth interviews with leading KOLs from the US and Europe
- The Consensus Outlook: Diabetes data analysis module provides annual historical and forecast product-level sales data

from an average of leading equity analysts' projections

Scope

KOL Insight Therapy Trends KOL Insight: Diabetes analyses the current and predicted key issues, current products and late-stage pipeline products. The report gives you qualitative, inside information from exclusive FirstWord interviews with 12 key opinion leaders (KOLs) through the following:

- KOL Insight Report — an in-depth analytical report on diabetes treatment trends
- Full report updates — issued to you after each and every significant diabetes market event
- Event Bulletins — the latest KOL views in response to each event

Key Report Features and Benefits

- Critical insights on products and market developments from leading US and European clinicians
- Complete coverage of all sub sectors - Basal, Prandial and Premixed insulins, DPP-IV inhibitors, GLP-1 agonists/analogues, SGLT-2 inhibitors, Thiazolidinediones and other non insulin anti diabetics
- Assessment of current leading diabetes products by sub sector
- Analysis of late-stage pipeline diabetes therapies by sub sector
- Competitive evaluation of leading players
- Current thinking and trends in the treatment of diabetes
- Predicted KOL treatment trends and market leaders
- Ongoing FirstWord clinical and market updates

Expert Opinion for Real World Insights The data and analysis in the report is enriched through the specific insights and opinions of leading clinicians working in diabetes in the US and Europe. Their views on specific drugs and treatment pathways provide a unique front line perspective from those working in clinical setting. The results of these detailed and extensive interviews are incorporated though out the text so they can be read in the context of the issue or product being discussed.

US KOLs

- Dr Elif Oral, MD, Associate Professor of Endocrinology, University of Michigan, Ann Arbor, MI.
- Dr Sonal Singh, MD, MPH, Assistant Professor, Division of General Internal Medicines, John Hopkins University, Baltimore, MD.
- Dr Carol Wysham, MD, Clinical Associate Professor of Medicine, Division of General Internal Medicines, University of Washington School of Medicine, Washington.
- Dr Joel Zonszein, MD, Director of the Clinical Diabetes Center at the University Hospital Albert Einstein College of Medicine, a Division of Montefiori Medical Center, NY.
- Requested anonymous, Associate Professor of Medicine, Endocrinology and Metabolism, Duke University, Durham, NC.
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European KOLs

- Professor Bernard Charbonnel, MD, Professor of Endocrinology and Metabolic Diseases, University of Nantes; Head of the Internal Medicine, Endocrinology and Diabetes Department, Hôtel Dieu, University Hospital of Nantes, France.
- Professor M elanie Davies, MD, Honorary Consultant, Diabetes, University Hospital Leicester, Leicestershire, UK.
- Professor Marc Donath, MD, Director, Endocrinology, Diabetes and Clinical Nutrition, University Hospital, Basel, Switzerland.
- Professor Baptist Gallwitz, MD, Professor, Professor of Medicine, Diabetes, Eberhard Karls University, University Hospital of Tuebingen, Germany.
- Professor Jens Holst, MD, Professor of Medical Physiology, Department of Biomedical Sciences; Director of the

Research Cluster for Diabetes and Obesity; Vice Chairman, Faculty of Health Sciences,
University of Copenhagen

, Denmark. • Professor

Michael Nauck

, MD, Head, Diabeteszentrum Bad Lauterberg, Harz,
Germany

. • Professor

John Wilding

, MD, Head of the Department of Obesity and Endocrinology,
University of Liverpool

, UK.

Key Quotes from the Report"I like Janumet. I get a much more effective medication even in one pill a day using combination therapy. Janumet has this long acting glycol, so it is long acting. In early diabetes, together with lifestyle changes, I often use a combination of DPP-IV with metformin, either once or twice a day because it doesn't cause hypoglycaemia. The patients don't need to monitor their blood sugar three, four, five times a day. They don't get admitted to the hospital with hypoglycaemia so the side effects are low. So I start treating these patients with a combination therapy, like Janumet." Dr Joel Zonszein

(US)"I think lots of people use Kombiglyze because it improves compliance so it makes sense. In the therapeutic armamentarium it's the only real once daily combination." Professor Sonal Singh

(US)"In terms of efficacy, side effects, convenience and device, Victoza is the preferred GLP-1. If I look at the new-starts, probably 60 percent of people are going for the Victoza" Dr Carol Wysham

(US)"The prevention of hypoglycaemia is a very important aim for the classical drugs and an unmet need. We should be searching for alternatives to insulin." Professor Baptist Gallwitz

(EU)"I am not too optimistic that you can improve DPP-IV inhibitors to be more efficacious. You may well be able to improve GLP-1 agonists to have more efficacious drugs that have less side effects based on the variety within the class that we have seen until now. I think that the pharmaceutical industry as a whole is a little bit running out of ideas, so we really need to identify good targets." Professor Michael Nauck

(EU)"I think if someone came up with a reasonably well-tolerated drug that helped you lose weight [and] that you only had to take once a month or once a year? Everyone would be on that. US Key Opinion Leader"Our local insurance company have taken all of what they consider tier 3 drugs, and they include all the GLP-1 agents including the DPP-IV inhibitors, and just put them on a 50-percent co-pay. Fifty percent of a lot of money is still a lot of money." Dr Carol Wysham

(US)

KOL Insights -- Key Topics

• Current diabetes marketplace• Epidemiology• Aetiology• Diagnosis• Current treatment landscape• Reimbursement of key diabetes brands• Current marketed therapies• Pipeline therapies• Unmet needs• Current treatment algorithm• Future treatment algorithm• Future developments in Diabetes

Consensus Outlook

Use this detailed report and powerful interactive Excel spreadsheet to compare and contrast companies and products now and in the future. Therapy Trends Consensus Outlook: Diabetes includes the following comprehensive resources:

• An in-depth forecast report based on consensus figures from 13 leading analysts. Rich in tables and charts, the report maps the impact of future events to predict product and company performance• An interactive forecast data analysis spreadsheet comparing critical market parameters including market size, product sales, market shares and competitive status over the period 2007 to 2017• Timely event-driven market forecast report and data analysis updates over 12 months

Report features:

• Historical diabetes sales from 2007–2012• Forecast diabetes sales from 2013-2017• Key competitors and drug developers• Current and late-stage pipeline drugs• Future event mapping to forecast data points• Expected impacting factors on global forecasts

Use Consensus Outlook to:

• Chart predicted market growth and product sales• Map your own market parameters• Tailor your strategic and investment focus• Assess your current and future sales resources• Set

proactive launches and branding strategies

Analysts compared:

• Barclays Capital• Credit Suisse• Deutsche Bank• Goldman & Sachs• International Strategy & Investment• Jefferies• JP Morgan• Merrill Lynch• Morgan & Stanley• Societe Generale• Stifel Nicolaus• UBS•Wells Fargo

Content Highlights and Products Covered:

• Research Methodology• Diabetes Marketplace• Key Diabetes Developers• Diabetes Class Dynamics• Lantus (insulin glargine; Sanofi) forecast• Levemir (insulin detemir; Novo Nordisk) forecast• Tresiba (insulin degludec; Novo Nordisk) forecast• Ryzodeg (degludecPlus; Novo Nordisk) forecast• NovoRapid/NovoLog (insulin aspart; Novo Nordisk) forecast• Humalog (insulin lispro; Eli Lilly) forecast• Apidra (insulin glulisine; Sanofi) forecast• NovoMix/NovoLog Mix (insulin aspart + insulin aspart protamine; Novo Nordisk) forecast• Januvia franchise (sitagliptin; Merck & Co) forecast• Galvus franchise (vildagliptin; Novartis) forecast• Onglyza franchise (saxagliptin; Bristol-Myers Squibb/AstraZeneca/ Otsuka) forecast• Nesina franchise (alogliptin; Takeda) forecast• Tradjenta franchise (linagliptin; Boehringer Ingelheim/Eli Lilly) forecast• Byetta (exenatide; Bristol-Myers Squibb/AstraZeneca/Amylin) forecast• Bydureon (exenatide once-weekly; Bristol-Myers Squibb/AstraZeneca/ Amylin) forecast• Victoza (liraglutide; Novo Nordisk) forecast• Lyxumia (lixisenatide; Sanofi) forecast• Invokana (canagliflozin; Johnson & Johnson/Mitsubishi Tanabe) forecast• Forxiga (dapagliflozin; Bristol-Myers Squibb/AstraZeneca) forecast• Actos (pioglitazone; Takeda) forecast• U300 (insulin glargine; Sanofi) forecast• LY2605541 (insulin peglispro; Eli Lilly) forecast• LY2963016 (biosimilar insulin glargine; Eli Lilly/Boehringer Ingelheim) forecast• IDegLira (liraglutide + insulin degludec; Novo Nordisk) forecast• Afrezza (Technosphere Insulin; MannKind Corporation) forecast• FIAsp (insulin aspart; Novo Nordisk) forecast• Eperzan (albiglutide; GlaxoSmithKline/Human Genome Sciences) forecast• LY2189265 (dulaglutide; Eli Lilly) forecast• BI-10773 (empagliflozin; Boehringer Ingelheim/Eli Lilly) forecast

Continually Updated in Response to Market Developments

The world of pharma is ever changing and executives must always be up-to-date with the latest

developments that could affect their own products, position and research. That is why FirstWord's guarantee to keep Therapy Trends updated offers real commercial advantage.

Consider the benefits:

- Content will be fully updated in response to market developments such as new product approvals or pivotal research results for 12 months from the date of purchase
- Such updates are incorporated throughout the KOL reports ensuring the change is reflected in every aspect of the report
- There is no limit and all relevant events will result in an update
- You'll receive these updates directly, within days of each event's occurrence
- All updates are included in the price

Whatever happens in the market you'll always be able to assess the impact with FirstWord Therapy Trends

Unrivalled Sources Ensure Complete Coverage

Our unique disease selection matrix pinpoints those disease sectors of the highest commercial potential, and draws information from multiple novel and expert sources, including:

- Exclusive views from leading global experts
- Comprehensive consensus research
- Live dispatches and critical industry data
- Online opinions from 535,000 vetted physicians
- Data from over 125 medical conferences each year
- Over 2,000 peer-reviewed medical journals
- Over 450 pharmaceutical news sources

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