

OVERVIEW

- Catalyst
- Summary

EXECUTIVE SUMMARY

- Strategic scoping and focus
- Datamonitor key findings
- Related reports
- Published diabetes reports

MARKET DEFINITION

- Market definition for antidiabetic drugs
- Forecast methodology and assumptions
 - Methodology flow
 - Patent expiries
 - New product launches
- Additional forecast methodology

MARKET OVERVIEW AND CONTEXT

- Current and future market dynamics overview
 - DPP-IV inhibitors and GLP-1 agonists will dominate non-insulin antidiabetics sales
 - US continues to dominate antidiabetic sales
 - US market declines with loss of Actos exclusivity before rising again
 - Japan market provides key late-stage revenues for Actos franchise even with generic competition
 - GLP-1 agonists will continue their high uptake in France
 - Germany's reimbursement regulations could raise market entry barrier for pipeline products
 - DPP-IV inhibitors will dominate key non-insulin antidiabetic sales in Italy
 - Marketed and pipeline products drive Spanish market growth
 - Strong growth in diagnosed diabetes population drives UK market.

PRODUCT FORECASTS

- DPP-IV inhibitor product forecasts
 - Januvia franchise (sitagliptin; Merck & Co.)
 - Galvus franchise (vildagliptin; Novartis)
 - Onglyza franchise (saxagliptin; Bristol-Myers Squibb/AstraZeneca)
 - Nesina franchise (alogliptin; Takeda)
 - Tradjenta franchise (linagliptin; Boehringer Ingelheim/Eli Lilly)
 - Teneligliptin (Mitsubishi Tanabe)
- GLP-1 agonist product forecasts
 - Byetta (exenatide twice-daily; Amylin)
 - Victoza (liraglutide; Novo Nordisk)
 - Bydureon (exenatide once-weekly; Amylin/Alkermes)
 - Lyxumia (lixisenatide; Sanofi/Zealand Pharma)

Syncria (albiglutide; GlaxoSmithKline)

LY2189265 (dulaglutide; Eli Lilly)

Glitazone product forecasts

Actos franchise (pioglitazone; Takeda)

SGLT-2 inhibitor product forecasts

Dapagliflozin franchise (Bristol-Myers Squibb/AstraZeneca)

Canagliflozin franchise (Johnson & Johnson/Mitsubishi Tanabe)

BI-10773 (empagliflozin; Boehringer Ingelheim/Eli Lilly)

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