MARKET REPORT

Frontier Pharma: Obesity - Identifying and Commercializing First-in-Class Innovation

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Summary

Obesity is a major growing health concern around the world. In most markets, a person is considered obese if their Body Mass Index (BMI) exceeds 30 kilograms per square meter (kg/m2), calculated by dividing body mass in kilograms by height in meters squared. With the global prevalence continuing to rise, the disease has placed significant burden on healthcare expenditure, as it is also a major risk factor for cardiovascular diseases, diabetes and cancer.

Anti-obesity pharmacotherapy can be used as an adjunct lifestyle modification to improve weight loss in order to significantly reduce obesity-associated health risks in obese patients. However, the use of currently available anti-obesity drugs is largely limited by poor long-term safety and a modest weight loss effect. Despite substantial clinical and regulatory challenges, the early-stage obesity pipeline remains robust, containing a high level of first-in-class innovation that has the potential to be translated into effective and safe weight loss treatments.

Scope

Historically, the obesity market has suffered from long-term safety concerns and modest efficacy with current treatments, both of which contribute to the low prescription rate and limited widespread use.

- What are the main safety concerns that lead to significant challenges in gaining drug approval in obesity?

- Why is sustainable weight loss difficult to achieve, and what is the implication for future drug development?

Analysis reveals a high level of innovation and diversity in the pipeline, with 75 first-in-class programs identified to act on 60 unique molecular targets.

- What is the dominant target family across these first-in-class pipeline products?

- How well do they align with the underlying signaling pathways governing the central and peripheral regulation of food intake, and energy expenditure?

Some first-in-class targets are deemed more likely to be developed into marketable treatments than others, having demonstrated substantial body weight reduction in Preclinical studies and addressing multiple mechanisms underpinning the development of obesity.

- What is the scientific rationale behind these targets? How are they likely to surpass existing treatment?

- Apart from body weight change, what other parameters are commonly used to measure the effect of investigational therapies?

Deals involving first-in-class obesity products are more likely to be made in earlier stages of development than non-first-in-class deals, supported by industry-wide analysis.

- What is the dominant molecular target in the obesity deals landscape?

- What are the promising first-in-class products still available for future licensing?

Reasons to buy

This report will allow you to -

- Understand the current clinical and commercial landscape by considering disease pathogenesis, diagnosis, prognosis, and the available treatment options and their limitations in terms of safety and efficacy.

- Visualize the composition of the obesity market to highlight the current unmet needs in order to gain a competitive understanding of the key opportunities.

- Analyze the obesity pipeline and stratify by stage of development, molecule type, and molecular target; the diversity of molecular targets in the pipeline is extremely encouraging as obesity is characterized by the complex interplay between central and peripheral mechanisms.

- Assess the therapeutic potential of first-in-class targets using a proprietary matrix that assesses and ranks first-in-class products according to clinical potential.

- Target the most promising and innovative obesity products for early-stage investment by analyzing trends in licensing and co-development deals and accessing a curated list of first-in-class therapies potentially open to deal-making opportunities.

Additional Details

Publisher : GBI Research
Reference :
Number of Pages : 87
Report Format : PDF
Publisher Information :

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