

Edoxaban - Potential Game Changer in Oral Anticoagulant Market

Description: Edoxaban - Potential Game changer in oral anticoagulant market

Stroke Prevention in Atrial Fibrillation represents the largest opportunity for the new generation oral anticoagulants, besides a very large prevalence, there is a very clear unmet need. There are 1.7 million patients in the US treated for non-valvular atrial Fibrillation with warfarin, in Europe the prevalence is almost twice and in Japan there are close to million patients.

About 35% of the AF patients are currently not treated with warfarin because of warfarin related constraints (drug-drug /dietary interactions, difficulty in INR control). Hypothetically assuming a 100% market share shift from warfarin/aspirin/other therapies to new generation oral anticoagulants, the annual market size works out to be \$22b (at \$3000 as annual cost of therapy). Besides the new generation oral anticoagulants, there is also the watchman device (currently in Phase 3) from Boston Scientific, which as well could be a major contender of market share.

The recent complete response issued by the USFDA to Eliquis was very much unexpected and has added uncertainty to the forecasts around this class. We see Daiichi Sankyo's Edoxaban and Boston Scientific's watchman device as potentially underestimated threat in the consensus forecasts for the new generation oral anticoagulants.

This report also has a market model for the new generation oral anti coagulants. The market model has been categorized into three segments

1) Warfarin Treated Patients

2) Aspirin Treated Patients

3) Patients on Dual Anti-platelet therapy / Patients on no therapy. A market model for each of these market segments has been separately prepared for the major geographies (Japan, EU and US).

The relative market share of new generation coagulants has been assigned based on

1) A thorough / detailed assessment of the pros and cons of Edoxaban success in ENGAGE AF and its expected clinical profile

2) A thorough / detailed assessment of the pros and cons of Watchman Device Success in ongoing PREVAIL trial and its expected clinical profile

3) Relative merits and demerits of the newer treatment options

4) Existing market dynamics with regard to patient's / physician propensity to switch to new generation oral anticoagulants

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