Major growth in the anticoagulant market continued through 2017, primarily due to the increasing global prevalence of multiple cardiovascular (CV) indications including atrial fibrillation, acute coronary syndrome, peripheral artery disease, and venous thromboembolism. Yet, cheap and established anticoagulants such as warfarin and heparins continue to present a barrier for new anticoagulant entrants, according to GlobalData , a leading data and analytics company.

After the launch of the novel oral anticoagulants (NOACs) almost a decade ago, encouraging NOAC clinical trial data along with increased experience managing patients taking NOACs, has led physicians to acknowledge that the drugs offer several benefits.

Jesus Cuaron, PhD, PPM, Healthcare Analyst at GlobalData , comments: “Advantages include the fact that they do not require regular monitoring and are known to be safer and non-inferior—if not superior—in efficacy to the historical anticoagulants (warfarin and heparin). All of the aforementioned attributes have led to the enormous success of these agents.”

Despite the first marketed NOAC, Boehringer Ingelheim’s Pradaxa, soon facing generic erosion, the NOACs—specifically, direct factor Xa inhibitors (Xarelto, Eliquis, Lixiana/Savaysa, and Bevyxxa)—will dominate the CV market for years.

IMAGE FOR PUBLICATION, PLEASE CLICK HERE: ‘ Global sales of branded NOACs, direct factor Xa inhibitors ($M), 2011-2022’

Cuaron continues: “The ongoing arrival of anticoagulant reversal agents, such as marketed Boehringer Ingelheim’s Praxbind and upcoming Portola Pharmaceuticals’ AndexXa that could be employed in the case of a serious bleeding event, are poised to give NOAC developers an additional marketing boost.”

In 2017, the NOACs continue to dominate the anticoagulant landscape, but there are promising pipeline agents that are being developed. Ionis and Bayer are developing IONIS-FXIRX, a second-generation antisense anticoagulant drug in Phase II clinical trials that separates antithrombotic activity from bleeding risk. GlobalData expects IONIS-FXIRX to

launch in 2022.

Cuaron adds: “There is also tecarfarin, a novel vitamin K antagonist in Phase III clinical trials for patients with prosthetic heart valves and renal insufficiency. We expect tecarfarin, being developed by Espero and Armetheon, to launch in 2023.”