Evaluate Vantage

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Abbvie’s next migraine contender looks good, but watch the side effects

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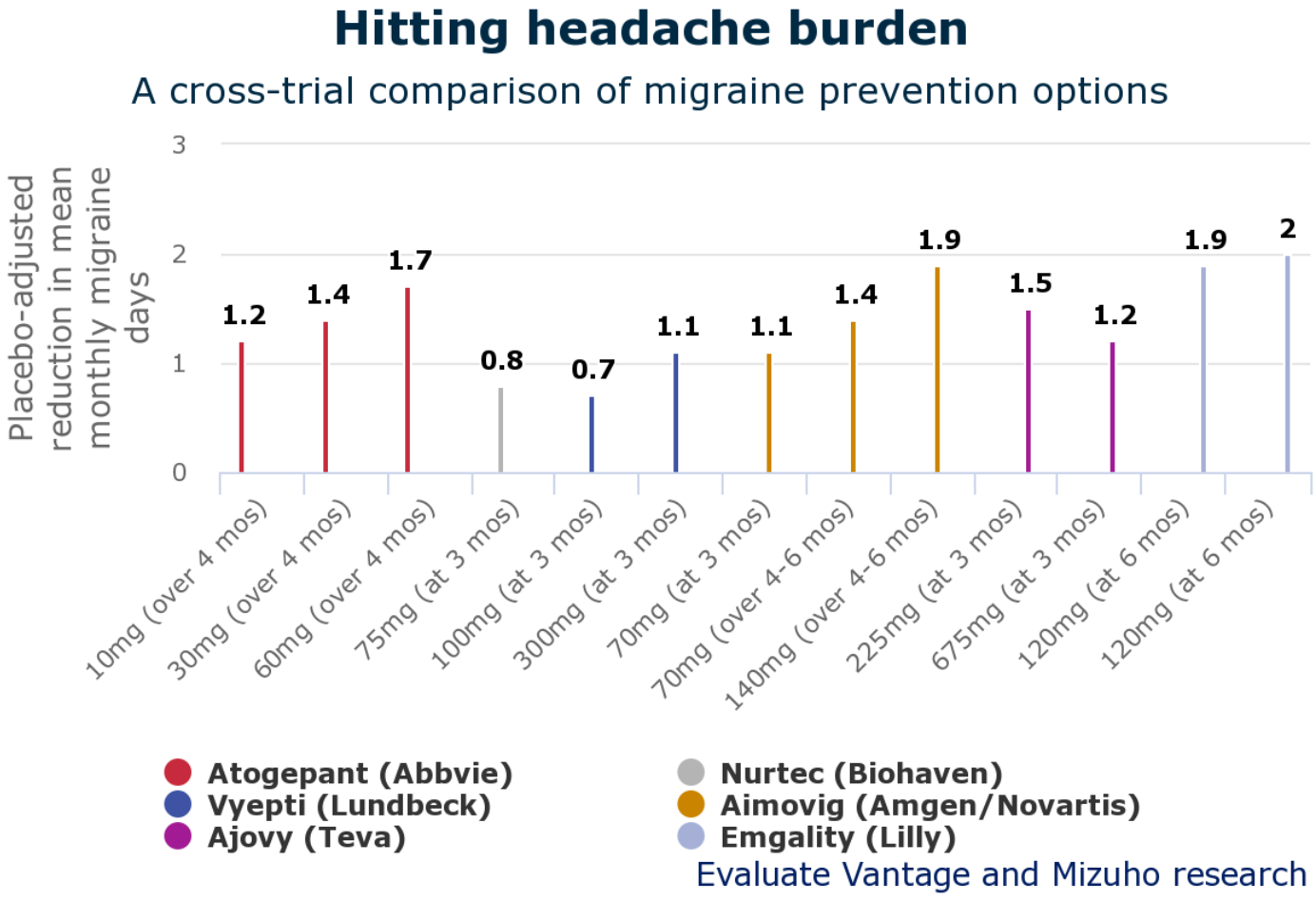
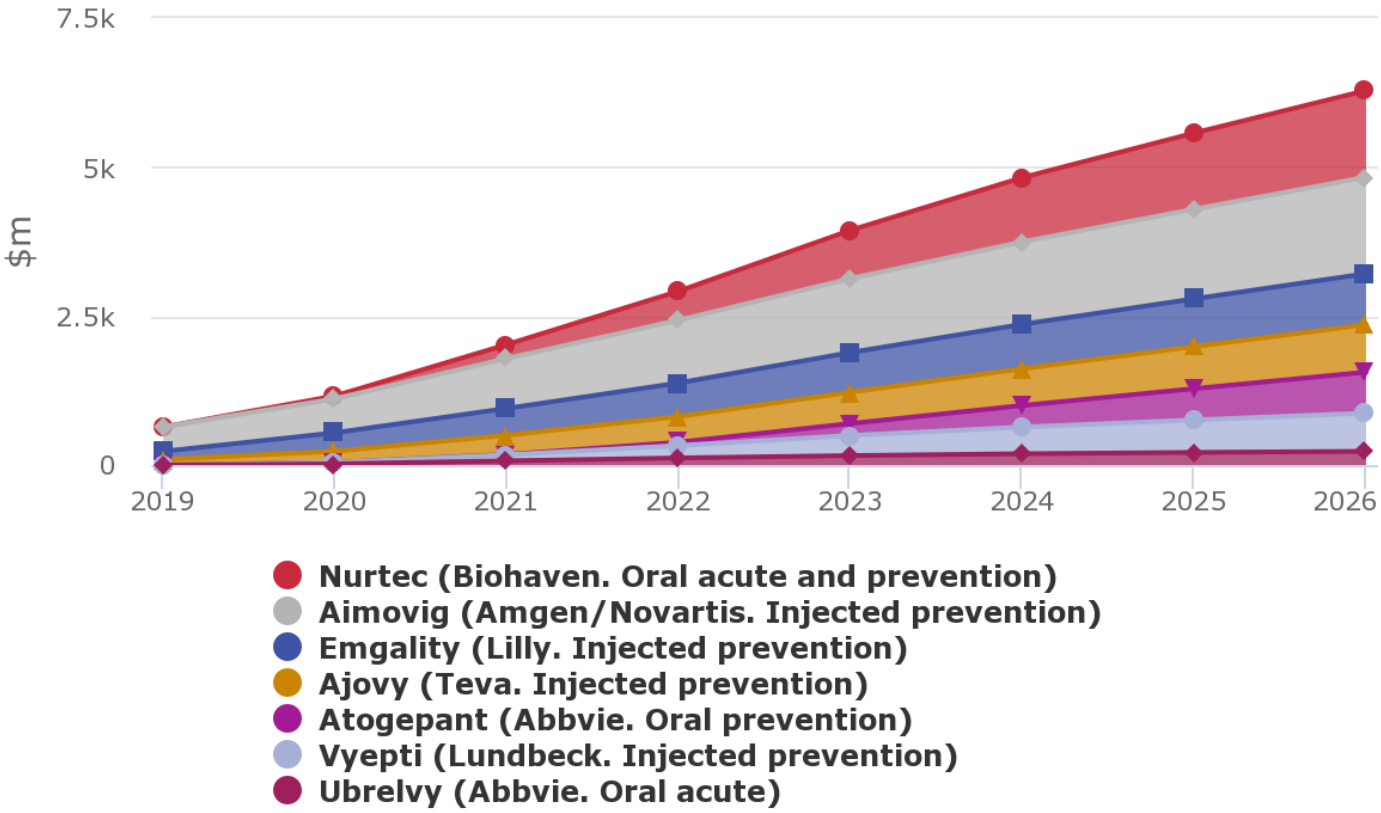
Impressive efficacy in the Advance trial of Abbvie’s atogepant, a new contender for the migraine prevention space, sets the project up for approval next year. Like three antibodies already on the market atogepant hits CGRP, however atogepant is an oral small molecule. The table below, derived from data put together by Mizuho analysts, shows Abbvie's project holding its own in terms of reduction in mean monthly migraine days; the usual caveats of cross-trial comparison apply here. The most direct competition will come from Biohaven’s Nurtec, which is also oral. Nurtec was recently approved as an acute migraine treatment and should win a prevention indication early next year. Analysts believe that having the same product in both prevention and acute settings could be an advantage for Biohaven. Safety could be another. Atogepant was associated with constipation (6.9-7.7% of patients across all doses) and nausea (4.4-6.1%), neither of which were flagged in Nurtec trials. Constipation is a known issue with anti-CGRPs – last year the FDA slapped a new warning of serious complications from constipation on Amgen’s Aimovig. Abbvie will be relying on its strong position in migraine – Botox is a major product in prevention – to make a difference here.



Targeting CGRP: a sales outlook



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