Evaluate Vantage

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Lilly steps up its oral obesity push

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Mounjaro might be approaching the finish line in obesity, but Lilly is wasting no time in pushing forward its follow-on projects. Two new trials of its oral GLP-1 contender, orforglipron (LY3502970), are now listed on CT.gov, joining the open-label Achieve-4, which began recruiting in April. Only very top-line phase 2 data on orforglipron have been released so far, and Lilly has admitted that the agent is unlikely to promote as much weight loss as Mounjaro, which hits GIP as well as GLP-1. Analysts already expect big things, however: *Evaluate Pharma*'s sellside consensus sits at sales of $631m by 2028. Orforglipron is intended to target broader, primary care indications, the company said on its last earnings call, and perhaps meet demand in middle-income markets in China and other regions. Being “cheaper and easier” to make than injected Mounjaro also helps. Novo Nordisk's struggle to meet demand for its obesity drug, Wegovy, arguably creates a further incentive for obesity hopefuls to get trials of novel agents up and running quickly. Recruitment is presumably not going to be a problem, raising the prospect of very speedy development timelines for those coming behind. Expect the likes of Pfizer and Amgen to also move quickly here.

Orforglipron: the pivotal programme so far

Trial	Setting	Recruitment	Primary completion date
Attain-1	Placebo controlled; adults with obesity or overweight with weight-related comorbidities	3,000	Sep 2025
Attain-2	Placebo controlled; adults with obesity or overweight and type 2 diabetes	1,500	Jun 2025
Achieve-4	Versus insulin glargine; adults with type 2 diabetes and obesity or overweight and increased cardiovascular risk	2,620	Aug 2025

Source: clinicaltrials.gov.