Commercial Insight: Antihormonal Cancer Therapies - Leading brands strive to minimize generic sales erosion

Description: Introduction

Antihormonal cancer therapies are a class of drugs used predominantly in the treatment of breast cancer and prostate cancer. The high incidence of these tumor types translates into a significant commercial potential for drug developers. Collectively, the antihormonal therapy cancer brands generated sales of about $7.0 billion in the seven major pharmaceutical markets in 2009.

Scope

- In-depth analysis of the current and future antihormonal therapies market across the US, 5EU and Japan, plus a rest of world snapshot
- Antihormonal therapy sales forecasts for brands and generics from 2009 to 2019
- Assessment of the leading cancer brands and drug classes to identify key success factors within this sector
- Evaluation of the strategies of leading players in the antihormonals market

Highlights

The antihormonals market was worth $7.0 billion in 2009 across the seven major pharmaceutical markets. Datamonitor forecasts the antihormonals market will shrink marginally in the forecast period 2009–2019, at a CAGR of negative 0.7%.

In 2019 the top three brands in terms of forecast sales will be Arimidex, Lupron (leuprolide; Takeda/Abbott) and Casodex (bicalutamide; AstraZeneca). Despite losing around 54% of its current sales value to generic competitors, Arimidex will retain its market leading position.

In a mature market, the importance of product lifecycle management is high. AstraZeneca was the key player in the market in 2009, with an antihormonals portfolio valued at over $3.2 billion. With successful lifecycle management and a considerable investment in marketing activities, AstraZeneca has built a strong brand presence for its products.

Reasons to Purchase

- Quantify the performance of each of the marketed antihormonal therapy cancer brands in the seven major markets over the period 2009 to 2019
- Acquire a detailed account of antihormonal therapy cancer brand dynamics and the events that drive and limit their market growth
- Benchmark antihormonal therapy cancer brands against their generics and rest of class and align their 7MM performance with a rest of world snapshot

Contents: OVERVIEW Catalyst Summary EXECUTIVE SUMMARY Strategic scoping and focus Datamonitor insight into the antihormonal cancer therapies market Related reports Upcoming related reports
MARKET DEFINITION
Definition of the cancer market
Antihormonal therapies by ATC class
L2A3 - Luteinizing hormone-releasing hormone agonists
L2B1 - Anti-estrogens
L2B2 - Anti-androgens
L2B3 - Aromatase inhibitors
L2B9 - Other hormone antagonists

MARKET OVERVIEW
Seven major markets
Current and future market overview
The antihormonals market will shrink marginally in the forecast period
Patent expiries of leading antihormonal brands are set to occur within the next 5 years
The US will suffer the greatest impact of generic erosion, losing around 25% of its value over the forecast period
The aromatase inhibitors will continue to be the leading drug class in 2019
The current leading antihormonal brands will suffer generic sales erosion but will maintain a high level of sales
The antihormonal therapies market will shrink from $7.0 billion in 2009 to $6.5 billion in 2019 across the seven major pharmaceutical markets
Opportunities and threats
Opportunity 1: aging population will result in increasing cancer incidence
Opportunity 2: oncology therapy sales continue to experience strong growth
Opportunity 3: high levels of unmet need
Threat 1: Pharma's transition towards specialist secondary care indications may further competition in the oncology market
Threat 2: the cost of drug development continues to rise
Threat 3: ongoing cost-containment measures
US
Current and future market assessment
The US antihormonals market will suffer the greatest impact of generic sales erosion
Opportunities and threats
Opportunity 1: the US's large population and high healthcare expenditure will continue to offer commercial opportunities for drug developers
Opportunity 2: healthcare reform will boost the number of insured in the US
Opportunity 3: closure of the Medicare Part D coverage gap is good news for branded Pharma
Threat 1: growing regulatory pressures increase costs and decrease market penetration for Pharma
Threat 2: patent expiries and the resulting generic competition will erode branded sales revenues
Threat 3: the US health reform law will intensify cost-containment pressures
Japan
Current and future market assessment
The antihormonals market in Japan is forecast to grow over the forecast period
Opportunities and threats
Opportunity 1: the aging population represents a large and growing patient base
Opportunity 2: generic sales erosion remains low in Japan
Opportunity 3: decrease in lag times for launch of new drugs could accelerate new launches
Threat 1: government-enforced biennial cuts continue to have a negative effect on market growth
Threat 2: healthcare proposal to change current pricing system will be of limited benefit to Japanese Pharma
Threat 3: encouraging decrease in lag times for launch of new drugs
Five major European markets (5EU)
Current and future market assessment
The antihormonals therapies market in the five European countries will show marginal growth
The antihormonal therapies market will grow from $2.6 billion in 2009 to $2.7 billion in 2019 in the five major European markets
Opportunities and threats
Opportunity 1: EU Cancer Task Force will improve the availability of information while generating funds for research
Opportunity 2: reorganization of the European Medicines Agency (EMA) expected to streamline EU regulatory process
Threat 1: new European drug price reductions are likely to affect pharma industry growth
Threat 2: higher generic uptake in less mature EU markets will impact branded sales revenues
Threat 3: EC inquiry into delays in generics market entry will have wide-ranging ramifications for the branded and generics industry
Threat 4: Spain’s price cuts and reference groups are driving drug prices down
Threat 5: new low reimbursement rate created in France signals the growing pressure for cost-containment
Threat 6: NICE will remain a significant hurdle to commercialization of cancer drugs in the UK, despite
relaxation of its cost-effectiveness criteria
Threat 7: Germany’s new cost-effectiveness analysis system could add to the downward pressure on drug
prices
Threat 8: additional cuts to the price of oncology drugs in Italy are impending under its pay-for-performance
scheme

France
Current and future market assessment
The antihormonal therapies market in France will peak at around $654m in 2010.

Germany
Current and future market assessment
The antihormonal therapies market will grow from $727m in 2009 to $835m in 2019 in Germany

Italy
Current and future market assessment
The antihormonal therapies market will grow from $484m in 2009 to $512m in 2019 in Italy

Spain
Current and future market assessment
The antihormonal market in Spain will marginally shrink from $418m in 2009 to $396m in 2019 in Spain

UK
Current and future market assessment
The antihormonal therapies market will grow from $333m in 2009 to $348m in 2019 in the UK

Rest of the world snapshot
Rest of the world sales represent 18% of the global antihormonal market

Opportunities and threats
Opportunity 1: incidence of cancer is forecast to increase in the BRIC countries
Opportunity 2: emerging markets continue to attract pharma companies despite challenges

Threat 1: cost of new therapies is a barrier to market penetration

BRAND DYNAMICS
Overview of competitive landscape
Arimidex, Lupron and Casodex will be the top three antihormonal brands in 10 years time

Drivers of brand choice
Efficacy and toxicity are the most important drivers of brand choice

Trends in marketing strategies
Marketing strategy for leading brands
Patient information and support programs
Direct-to-consumer advertising

Arimidex (anastrozole; AstraZeneca)
Drug profile
Product positioning
SWOT analysis
Brand forecast to 2019
Arimidex set to lose 54% of its current sales value to generic competitors

Lupron (leuprolide; Takeda/Abbott)
Drug profile
Product positioning
SWOT analysis
Brand forecast to 2019
Lupron will be the top selling antihormonal therapy in 2019, with sales in excess of $1 billion

Casodex (bicalutamide; AstraZeneca)
Drug profile
Product positioning
SWOT analysis
Brand forecast to 2019
Patent expiries set to hamper sales of this class-leading brand

KEY DEVELOPERS
Strategic overview
Trends in corporate strategy
Strategic lifecycle management is essential in the antihormonal market

Commercialization partnerships are common for smaller players
AstraZeneca
Corporate strategy
Oncology antihormonals portfolio assessment
Takeda
Corporate strategy
Oncology antihormonals portfolio assessment
Portfolio assessment of other leading companies
BIBLIOGRAPHY
Journal papers
Websites
Datamonitor reports
Other
APPENDIX A - MARKET ASSUMPTIONS
Forecasting assumptions
New product launches
Patent expiries
Data definitions, limitations and assumptions
Standard units
Country group definitions
Rest of the World
The ‘all other EU countries’ group
The ‘Other non-EU countries’ group
Forecast methodology
Derivation of sales forecasts and pricing trends
Exchange rates
Report methodology
APPENDIX B
About Datamonitor
About Datamonitor Healthcare
About the Oncology analysis team
Disclaimer
List of Tables
Table 1: Definition of the cancer market, 2010
Table 2: Sales and growth of antihormonal therapy drug classes in the seven major pharmaceutical markets ($m), 2009-2019
Table 3: Key events impacting the antihormonal therapies market in the seven major markets, 2009-2019
Table 4: Antihormonal therapy sales forecasts in the seven major markets ($m), 2009-2019
Table 5: Summary of opportunities and threats that will impact the antihormonals market across the seven major markets, 2009-2019
Table 6: Sales and growth of antihormonal therapy drug classes in the US ($m), 2009-2019
Table 7: Top 5 branded antihormonals in the US in 2009 and 2019
Table 8: Antihormonal therapy sales forecasts in the US ($m), 2009-2019
Table 9: Summary of opportunities and threats to impact the antihormonals market in the US, 2009-2019
Table 10: Sales and growth of antihormonal therapy drug classes in Japan ($m), 2009-2019
Table 11: Top 5 branded antihormonals in Japan in 2009 and 2019
Table 12: Antihormonal therapy sales forecasts in Japan ($m), 2009-2019
Table 13: Summary of opportunities and threats to impact the antihormonals market in Japan, 2009-2019
Table 14: Sales and growth of antihormonal therapy drug classes in the five major EU markets ($m), 2009-2019
Table 15: Top 5 branded antihormonals in the five major EU markets in 2009 and 2019
Table 16: Antihormonal therapy sales forecasts in the five major EU markets ($m), 2009-2019
Table 17: Summary of opportunities and threats to impact the antihormonals market in the five major EU markets, 2009-2019
Table 18: Risk-sharing agreements between NICE and selected pharma companies in the UK, 2009-2010
Table 19: Sales and growth of antihormonal therapy drug classes in France ($m), 2009-2019
Table 20: Top 5 branded antihormonals in France in 2009 and 2019
Table 21: Antihormonal therapy sales forecasts in France ($m), 2009-2019
Table 22: Sales and growth of antihormonal therapy drug classes in Germany ($m), 2009-2019
Table 23: Top 5 branded antihormonals in Germany in 2009 and 2019
Table 24: Antihormonal therapy sales forecasts in Germany ($m), 2009-2019
Table 25: Sales and growth of antihormonal therapy drug classes in Italy ($m), 2009-2019
Table 26: Top 5 branded antihormonals in Italy in 2009 and 2019
Table 27: Antihormonal therapy sales forecasts in Italy ($m), 2009-2019
Table 28: Sales and growth of antihormonal therapy drug classes in Spain ($m), 2009-2019
Table 29: Top 5 branded antihormonals in Spain in 2009 and 2019
Table 30: Antihormonal therapy sales forecasts in Spain ($m), 2009-2019
Table 31: Sales and growth of antihormonal therapy drug classes in the UK ($m), 2009-2019
Table 32: Top 5 branded antihormonals in the UK in 2009 and 2019
Table 33: Antihormonal therapy sales forecasts in the UK ($m), 2009-2019
Table 34: Comparison of antihormonal drug class sales in the US, Japan, five major EU markets and Rest of the world markets ($m), 2009
Table 35: Leading branded antihormonal therapy drug sales in the seven major markets ($m), 2009-2019
Table 36: Marketing strategies employed by companies behind the top three antihormonal brands, 2010
Table 37: Arimidex (anastrozole) - drug profile, 2010
Table 38: Factors impacting revenues of Arimidex, 2009-2019
Table 39: Lupron (leuprolide) - drug profile, 2010
Table 40: Factors impacting the revenues of Lupron, 2009-2019
Table 41: Casodex (bicalutamide) - drug profile, 2010
Table 42: Factors impacting the revenues of Casodex, 2009-2019
Table 43: Leading companies in the antihormonals market in the seven major pharmaceutical markets ($m), 2009-2019
Table 44: Assessment of AstraZeneca's cancer antihormonals portfolio, 2010
Table 45: Assessment of Takeda's cancer antihormonals portfolio, 2010
Table 46: Assessment of Novartis's cancer antihormonals portfolio, 2010
Table 47: Assessment of Pfizer's cancer antihormonals portfolio, 2010
Table 48: Assessment of Sanofi-Aventis's cancer antihormonals portfolio, 2010
Table 49: Regional launch dates for new antihormonals in the seven major markets, 2010-2019
Table 50: Patent expiry dates for the approved antihormonals in the seven major pharmaceutical markets, 2010-2019

List of Figures
Figure 26: Methodology for forecasting price to remove impact of currency fluctuations on future trend

Ordering:
Order Online - http://www.researchandmarkets.com/reports/1294073/
Order by Fax - using the form below
Order by Post - print the order form below and send to
Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

| Product Name: | Commercial Insight: Antihormonal Cancer Therapies - Leading brands strive to minimize generic sales erosion |
| Web Address: | http://www.researchandmarkets.com/reports/1294073/ |
| Office Code: | SCD23GAK |

Product Formats
Please select the product formats and quantity you require:

| Quantity | Electronic (PDF) - Enterprisewide: |
|———|———|
| | USD 38000 |

| Quantity | Electronic (PDF) - Single User: |
|———|———|
| | USD 15200 |

Contact Information
Please enter all the information below in BLOCK CAPITALS

| Title: | Mr | Mrs | Dr | Miss | Ms | Prof |
|———|———|———|———|———|———|———|
| First Name: | | | | | | |
| Email Address: | * | | | | | |
| Job Title: | | | | | | |
| Organisation: | | | | | | |
| Address: | | | | | | |
| City: | | | | | | |
| Postal / Zip Code: | | | | | | |
| Country: | | | | | | |
| Phone Number: | | | | | | |
| Fax Number: | | | | | | |

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Account number</td>
<td>833 130 83</td>
</tr>
<tr>
<td>Sort code</td>
<td>98-53-30</td>
</tr>
<tr>
<td>Swift code</td>
<td>ULSBIE2D</td>
</tr>
<tr>
<td>IBAN number</td>
<td>IE78ULSB98533083313083</td>
</tr>
<tr>
<td>Bank Address</td>
<td>Ulster Bank, 27-35 Main Street, Blackrock, Co. Dublin, Ireland.</td>
</tr>
</tbody>
</table>

If you have a Marketing Code please enter it below:

Marketing Code: _______________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World