Commercial Insight: Cancer Targeted Therapies and Immunotherapies - Top monoclonal antibody brands will resist competitive pressures through to 2019

Description:

The oncology market has witnessed a sizeable shift of focus away from cytotoxic therapies and antihormonal therapies towards the more lucrative targeted therapies and immunotherapies class in the last decade. This class boasts several of the top-selling anticancer brands overall, and has fueled most of the recent rapid growth of the oncology market as a whole.

Scope

- Forecast sales of every marketed cancer targeted therapy and immunotherapy in each of the seven major markets over the period 2009 to 2019
- Analysis and segmentation of the market at various levels including drug class, country, brand and company
- Comprehensive brand profiles and analysis for the key brands, including approval dates, patent expiries and all key events likely to impact sales
- Snapshot of the cancer targeted therapies and immunotherapies market in the rest of the world

Highlights

Between 2010 and 2019, conditions in the oncology market will support relatively high growth rates for the targeted therapies and immunotherapies currently on the market. Combined sales in this class will grow at a CAGR of 6.6% from $19.5 billion in 2009 to reach $36.8 billion in 2019.

Avastin (bevacizumab; Roche/Chugai) was the leading oncology brand in 2009. Despite a number of setbacks (including failures in Phase III trials in certain new indications) and potential threats, sales of Avastin will continue to grow, driven by further indication expansions and increasing uptake in existing indications and new territories.

With a dominant presence in three of the four highest incidence solid tumors and the highest incidence hematological malignancy, Roche dominates the cancer targeted therapies and immunotherapies market. This will continue through to 2019, driven by the strong performance of the company's monoclonal antibody franchise.

Reasons to Purchase

- Quantify the performance of each of the marketed cancer targeted therapies and immunotherapies in the seven major markets over the period 2009 to 2019
- Assess the changing key opportunities and threats both for currently marketed and pipeline targeted therapy and immunotherapy brands
- Identify the leading brands in this market over the next 10 years and understand the key factors driving their success

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Market Definition
Definition of the cancer market
Cancer targeted therapies and immunotherapies by ATC class
L1D0: Antineoplastic antibiotics
L1X3: Antineoplastic monoclonal antibodies
L1X4: Antineoplastic protein kinase inhibitors
L1X9: All other antineoplastics
L4A0: Immunosuppressive agents

Market Overview
Seven major markets
Current and future market overview
Targeted therapies and immunotherapies will continue to be the leading class of anticancer therapy in terms of value and growth through to 2019
Indication expansions will offset patent expiries in the cancer targeted therapies and immunotherapies market
The five major European markets and Japan will grow at a higher rate, reducing the US market's dominance
Monoclonal antibodies will lead the cancer targeted therapies and immunotherapies market out to 2019
The dominance of Roche's monoclonal antibody franchise will continue through to 2019

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
Opportunity 4: potential for chronic treatment

Threat 1: the transition toward specialist secondary care indications may lead to intensified competition
Threat 2: the cost of drug development continues to rise
Threat 3: ongoing cost-containment measures
Threat 4: possible market entry of biosimilar monoclonal antibodies

US
Current and future market assessment
Sales growth in the US will become considerably slower in comparison to Japan and the five major European markets
Most cancer targeted therapy and immunotherapy sales in the US will continue to come from the monoclonal antibodies
Avastin will continue its US market dominance through to 2019, with forecast peak sales of $4.8 billion

Opportunities and threats
Opportunity 1: the US's large population and high healthcare expenditure offer commercial opportunities
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
Japan is set to become the second largest market for cancer targeted therapies and immunotherapies by 2019
The pattern of sales by drug class in Japan will resemble the other major markets more closely by 2019
Avastin will become the leading targeted cancer therapy brand in Japan by 2019

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: 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
Sales of targeted therapies and immunotherapies will grow more rapidly in the 5EU than in the US through
to 2019
Monoclonal antibodies will remain the leading class of targeted therapy and immunotherapy in the 5EU
Avastin is close to becoming the leading targeted therapy and immunotherapy brand in the 5EU
Opportunities and threats
Opportunity 1: EU Cancer Task Force will improve availability of information while generating R&D funds
Opportunity 2: streamlined regulatory process through reorganization of European Medicines Agency
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 myriad ramifications for the industry
Threat 4: Spain’s price cuts and reference groups are driving drug prices down
Threat 5: France’s new low reimbursement rate 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 may add to downward pressure on prices
Threat 8: impending cuts to oncology drug prices in Italy under its pay-for-performance scheme
France
Current and future market assessment
France will remain the largest market in the 5EU for cancer targeted therapies and immunotherapies
through to 2019
Germany
Current and future market assessment
While price cuts will restrict near-term growth, Germany will remain the second largest of the 5EU markets
through to 2019
Italy
Current and future market assessment
Italy will see the highest growth of cancer targeted therapies and immunotherapies in the 5EU in the next
ten years
Spain
Current and future market assessment
Price cuts will restrict near-term growth of cancer targeted therapies and immunotherapies sales in Spain
UK
Current and future market assessment
Cost-effectiveness restrictions will continue to hamper growth of cancer targeted therapies and
immunotherapies in the UK through to 2019
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Current market assessment
Rest of the world sales represent 20% of the global cancer targeted therapies and immunotherapies market
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Opportunity 2: emerging markets continue to attract pharma companies despite challenges
Threat 1: cost of new therapies is a barrier to market penetration
Threat 2: weak intellectual property rights significantly restrict the value of branded product sales
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Avastin, Rituxan and Herceptin will maintain their 2009 position as the top three brands in 2019
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Efficacy and toxicity of a drug are the most important drivers of cancer therapy brand choice
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Marketing strategy for leading brands
Avastin (bevacizumab; Roche/Chugai)
Drug profile
Product positioning
SWOT analysis
Brand forecast to 2019
Despite uncertainties over its future in breast cancer and Phase III developmental setbacks, Avastin will
remain the leading cancer brand through to 2019
Rituxan/MabThera (rituximab; Biogen Idec/Roche/Chugai/Zenyaku Kogyo)
Drug profile
Product positioning
SWOT analysis
Brand forecast to 2019
Rituxan appears to likely to resist the competitive threat from Arzerra, although biosimilars will have a
negative impact on revenue before the end of the forecast period
Herceptin (trastuzumab; Roche/Chugai)
Drug profile
Product positioning
SWOT analysis
Brand forecast to 2019
Biosimilars are likely to provide the greatest threat to Herceptin's market share over the forecast period

Gleevec/Glivec (imatinib; Novartis)
Drug profile
Product positioning
SWOT analysis
Brand forecast to 2019
Expiry of Gleevec's patent in all of the seven major markets will have the most significant negative impact on sales, reducing seven major market sales to below $1 billion by 2019

Revlimid (lenalidomide; Celgene)
Drug profile
Product positioning
SWOT analysis
Brand forecast to 2019
Revlimid's potential across a broad range of indications could allow it to become the 'Avastin' of the hematological malignancies market, achieving rapid sales growth over the forecast period

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Partnerships in the targeted therapies and immunotherapies market offer considerable benefits for smaller players and Big Pharma alike

Roche
Corporate strategy
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Big Pharma is turning to biologics in order to maintain presence in the oncology market

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