Gastric Cancer Drug Discoveries: What the Future Holds

Description: Original analysis of the clinical potential and commercial prospects for companies, launched products and pipeline candidates put into current market context.

The market is set for rapid and significant growth:

There is room for considerable change in the gastric cancer market as improved therapies seek to improve patient outcomes for advanced disease. Over the next seven years, Espicom expects to see the market grow by 133% from US$846 million in 2010, to US$1.97 billion in 2017, with the targeted therapies accounting for most of this growth. While competition amongst these targeted therapies will intensify from 2013/4, Roche will continue to dominate this market with Herceptin, which was recently approved in Japan.

Next generation chemotherapy:

While targeted therapies are expected to grow rapidly, it is chemotherapy agents which are leading the current market. One notable success of recent years is Roche's Xeloda, which is replacing 5-FU in the US and EU, where it has been approved as a first-line treatment in gastric cancer since March 2007. With US patents in force until 2013, Xeloda is the only branded chemotherapeutic for gastric cancer not facing generic competition at present.

The rise of targeted therapies:

Espicom believes that by 2017, targeted therapies will account for over 60% of the gastric cancer market. Competition for Herceptin will initially come from GSK's Tykerb/Tyverb, but Roche's Avastin, Merck's Erbitux and Lilly's ramucirumab are just some of those waiting in the wings over the coming period. One of the most promising candidates is Bayer's Nexavar where very promising PII trial results have given optimism for its prospects.

Critical Business Insights from this report which:

- Provides independent, reliable 7-year forecasts, market share and unique product scoring which give you real insights to the current and future business landscape
- Evaluates the competitive environment – assess winners and losers and know their pipeline content and status
- Covers major launched products and significant pipeline candidates
- Identifies promising mid-stage development candidates
- Forecasts the launch timeframe for new products or indications
- Summarises current clinical thinking on gastric cancer

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TSU-68
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