Apoptosis Market Report

Description: The main application of apoptosis research is presently in cancer treatment. It should be noted that this market is one of the largest and fastest growing sectors of the pharma industry. Of the 370 pipeline agents identified in Apoptosis 2009: Opportunities in Cancer and Other Diseases, 80% are anticancers. This report segments the apoptosis-related cancer market into:

a. direct apoptogens (apoptosis-inducing drugs known, during their development, to have apoptosis-related molecular targets)

b. first generation indirect apoptogens (established drugs such as cytotoxics which have turned out to rely on apoptosis for part of their efficacy)

c. second generation indirect apoptogens (recently introduced and pipeline drugs with non-apoptotic targets which nevertheless have apoptotic effects).

Opportunities for apoptosis modulators in indications such as CNS disorders and chronic inflammation/autoimmunity are also explored.

Key Features

- Examination of the molecular events in apoptosis which may become dysregulated, providing opportunities for therapeutic intervention.

- Description of morphological criteria for detecting apoptosis, as well as recent methodologies based on detecting specific biological aspects and biomarkers.

- Analysis of 370 apoptosis-modulating drug candidates (9% in Phase 3 or later) from 233 originating companies. These drugs target 148 known gene targets, of which the top 15 are shown in Figure 1.3 from the report, as reproduced below.

- Deployment of Stanford Research Institute's PANTHER Classification System to identify gene targets with a validated role in apoptosis.

- Analysis of 4,872 apoptosis-related patents and patent applications to identify technology trends and potential therapeutic applications.

Forecasts for the overall oncology-based apoptosis market, and its individual sectors.

Key Benefits

- Utilize biomarker and drug target information in this report to discover and develop drugs with apoptosis-modulating properties.

- Identify emerging areas of opportunity for apoptosis modulators in cancer, CNS diseases, and chronic inflammation/autoimmunity.

- Gain up-to-date competitive intelligence on apoptosis-modulating pipelines and identify the most promising drugs under development.

- Identify the leading originator companies developing apoptosis-modulating drugs.

- Use the patent analysis presented in this report to identify leading assignees, most influential patents and unexploited indications for apoptosis modulation.

- Devise a commercial strategy leveraging apoptosis by utilizing market forecasts for the oncology-based apoptosis market to 2013.

Key Issues Raised
- The ideal of cancer therapy is to promote apoptosis of cancer cells. Traditional chemotherapeutic agents (first generation indirect apoptogens) trigger events which result in apoptosis of cancer cells. However, they also kill normal cells. Second generation indirect apoptogens may be less toxic to normal cells.

- Wide prevalence of indirect apoptotic effects suggests that it is always worth screening for apoptotic effects of new anticancer drugs. Wider application of validated biomarkers of apoptosis in preclinical and clinical trials of new drugs is thus highly desirable.

- The utility of current anticancer therapies is limited by drug resistance, either intrinsic or acquired. Direct apoptogens target overexpressed anti-apoptotic proteins or downregulated pro-apoptotic proteins responsible for therapy resistance.

- Neurodegenerative diseases represent an area of unmet clinical need. No therapy for neuroprotection is currently marketed, but new apoptosis-modulating drugs in development show promise.

- Existing treatments for rheumatoid arthritis and other autoimmune conditions (anti-TNF therapies and glucocorticoids) may act partly via apoptosis modulation. However, new apoptosis-modulating therapies with improved specificity are needed.

Key Findings

- In our survey of the apoptosis drug landscape, we identified 370 drugs aimed at 148 known gene targets. HSP90 (heat shock protein 90) is numerically the most popular target overall.

- Seventy-six percent of all apoptosis-modulating drugs in development are anticancers, including 27 radio/chemosensitizers (7%). The overall apoptosis market is forecast to grow from $28 billion in 2008 to $57 billion in 2013.

- Of particular interest are first-in-class direct apoptogens (over 100 agents identified) which target elements of the apoptotic pathway (over 40 genes). The global market for direct apoptogens is forecast to grow from $606 million in 2008 to $12 billion in 2013.

- The leading subgroups of the direct apoptogens market are: proteasome inhibitors; modulators of heat shock proteins; TP53-targeted agents; caspase--targeted agents; BCL2-targeted agents; and multi-target apoptogens.

- Eighteen percent (65) of all apoptosis-modulating drugs in development are anti-inflammatory, and 6% (24) are CNS targeted. Our survey of apoptosis-related patents suggests that future drugs will also target infectious disease.

Key Questions Answered

- What types of apoptosis-modulating drugs are on the market?
- Which companies are leading the way in the development of apoptosis-modulating drugs?
- Which assays and biomarkers are increasingly used to define apoptosis during drug development?
- Why should all new anticancer drugs be screened for apoptotic effects?
- How is the apoptosis drug target landscape shaping up?
- What are the most popular targets of direct apoptogens in development for the treatment of cancer?
- How is the global cancer apoptosis market segmented and how are these sectors expected to perform over the period 2008-13?
- What progress is being made in developing apoptosis-modulating drugs for the treatment of CNS diseases and inflammation/autoimmunity?
- What is the nature of the apoptosis-related patent landscape?
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