R&D Trends: Renal Cell Cancer - Crowded RCC market remains attractive to drug developers

Description: Renal cell cancer (RCC) continues to attract drug developers in spite of the crowded nature of the market. Currently approved targeted therapies have been unable to produce durable responses in RCC patients and only delay progression. As a consequence, effective treatment options capable of sustaining responses in RCC are still needed.

Scope

- In-depth analysis of renal cell cancer pipeline – development stage, therapeutic class, molecular targets, and changes in pipeline since 2007
- In-depth analysis of current comparator therapy – target product profile, unmet needs, and innovative early-stage approaches
- In-depth analysis of clinical trial design – patient selection, duration, clinical endpoints, and future developments in trial design
- The future of renal cell cancer treatment – improved options in early stage disease, identification of biomarkers, and development of a cancer vaccine

Highlights

- Seven targeted therapies are available for the treatment of RCC but there is still considerable pipeline activity. Currently approved targeted therapies have been unable to produce durable responses in RCC patients and only delay progression. As a consequence, effective treatment options capable of sustaining responses in RCC are still needed.

- Further research is required to establish the molecular subtypes within histological subtypes of RCC. Compared to other heterogeneous tumors such as melanoma or non-small cell lung cancer, fewer genetic mutations have been identified in RCC tumors that could assist in patient segmentation.

- The identification of biomarkers will enhance the treatment of RCC. With the availability of numerous treatment options in RCC, clinicians are tasked with determining the optimal targeted agent for a patient. Biomarkers may assist in selecting patients that are most likely to respond to current treatments.

Reasons to Purchase

- Identify key trends in the renal cell cancer pipeline, including development stage, molecular targets, and therapeutic class
- Identify the target product profile for new renal cell cancer therapies and innovative early-stage drug targets
- Assess key decisions in renal cell cancer clinical trial design regarding patient selection, trial duration, endpoints, and predictive biomarkers

Contents:

OVERVIEW
- Catalyst
- Summary

EXECUTIVE SUMMARY
- Strategic scoping and focus
- Datamonitor key findings
CLINICAL PIPELINE OVERVIEW
- Datamonitor has identified 62 drugs in development for renal cell cancer
- A large percentage of drugs in development are in Phase II clinical trials
- Targeted therapies dominate the late-stage pipeline
- The renal cell cancer pipeline has grown over the last 5 years
- The clinical potential of a cancer vaccine in RCC continues to be an incentive for drug developers
- Late-stage development compounds recently discontinued
  - Oncophage (vitespen; Agenus)
  - TroVax (MVA-h5T4/Oxford BioMedica)

TARGET PRODUCT PROFILE
- Renal cell cancer
  - Sutent (sunitinib; Pfizer)
  - Clinical trial data for Sutent
  - Unmet needs in renal cell cancer

CLINICAL TRIAL DESIGN IN RENAL CELL CANCER
- Clinical trial design
  - Patient selection
  - Clinical trial duration
  - Clinical trial endpoints
  - Future developments in clinical trial design
  - Immunological monitoring of cancer vaccines in RCC
  - Using molecular endpoints in early-stage clinical trials

INNOVATIVE EARLY-STAGE APPROACHES
- Mesenchymal transitional factor (MET)
- PI3K/Akt pathway
- Multiple targeting of the PI3K and mTOR

THE FUTURE OF TREATMENT IN RENAL CELL CANCER
- Improved treatment options in early-stage disease
- The identification of biomarkers will enhance the treatment of RCC
- Efforts continue to develop a cancer vaccine in RCC

BIBLIOGRAPHY
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