World Castration-Resistant Prostate Cancer (CRPC)/HRPCA Therapeutics - Market Opportunity and Forecast, 2014 - 2020

Description: Castration-Resistant Prostate Cancer (CRPC) or Hormone Refractory Prostate Cancer (CRPC), a type of prostate cancer that typically recurs after administering androgen deprivation therapy (ADT), is gaining prominence in the prostate cancer market. The global CRPC market is poised to expand at a significant pace, owing to high unmet clinical need, limited survival benefits, growing prevalence rates and fast emerging treatment modifications. The market growth would pivot around the novel breakthrough treatments responsible for reaping survival benefits. The survival benefit would be instrumental in governing the peak sales and market penetration of novel approved drugs.

The global CRPC market is expected to reach $9.5 billion by 2020, at a CAGR of 9.1% during the forecast period (2015-2020). Promising drug pipeline, evolving treatment patterns, emerging untapped non-metastatic CRPC space and augmented patient awareness are the factors that are expected to boost the market growth. Further, untapped CRPC market in the Asia-Pacific and LAMEA region would also accelerate the overall market growth during the forecast period. Untapped non-metastatic CRPC settings would further bolster the market growth. On the other hand, factors such as premium pricing of CRPC drugs, uncertain reimbursement policies and lack of differentiation in mechanism of action among the approved and novel agents are likely to curtail the market growth.

The market would gain traction in the developing regions of Asia-Pacific and third-world countries such as Africa and Latin America. The large undiagnosed patient population, rapid urbanization, rising disposable income, improved government funding towards cancer and growing awareness about prostate cancer would be some of the prime reasons responsible for the unparalleled market growth in these regions. However, oncologists/urologists reluctance towards adoption of these premium treatments in countries like India and China would continue to remain a key challenge for the leading innovators.

To provide a detailed market assessment, the report segments the CRPC market on the basis of therapy type, drug delivery method and geography. Based on therapy type, the market is segmented across various segments such as Chemotherapy, Hormonal Therapy, Immunotherapy and Radiotherapy. Hormonal therapy segment spearheads the therapy types market, governing around 4/5th of the global market value in 2014 and would continue to maintain its market position during the forecast period (2015-2020). Radiation therapy segment is projected as the fastest growing segment throughout the forecast period. Based on drug delivery method, the market is segmented into oral and injectable therapy segments. Oral therapy segment dominates the global CRPC market; however, injectable segment is expected to grow at a faster rate. The report covers a geographic breakdown and a detailed analysis of each of the aforesaid segments across North America, Europe, Asia Pacific and LAMEA regions. North America region governs a dominant share in the global CRPC market; however, Asia-Pacific and LAMEA region are expected to register the highest CAGR during the forecast period.

The market registered substantial growth in the recent years, owing to the various strategies adopted by leading market players. One of the key strategies adopted is collaboration agreement. Astellas Pharma Inc. for instance in 2009, entered into an agreement with Medivation, Inc. to co-develop and co-commercialize MDV3100 (now Xtandi) for the treatment of CRPC. A comprehensive competitive analysis and profiles of major market players such as Astellas Inc., Johnson & Johnson, Sanofi S.A, Dendreon Corporation, Bayer AG, and others have been provided in the report.

KEY MARKET BENEFITS:

- This report provides an extensive analysis of the current and emerging market trends and dynamics in the global CRPC (metastatic and non-metastatic) market

- The CRPC market scenario is comprehensively analysed in accordance to the key regions

- In-depth analysis of CRPC (chemotherapy and post-chemo) settings is implemented in the report

- The market estimations are made in the report by conducting high-end analysis of the key market
segments for the period of 2014-2020

- Extensive research is done for the market by therapy type which instils a clear understanding regarding the currently used therapy drugs and evolving role of immunotherapies and radiopharmaceuticals

- A detailed SWOT analysis enables to study the internal environment of the leading companies for strategy formulation

- Owing to an emerging pipeline in the market, pipeline analysis studies have also been taken into account to better understand the market potential and opportunities

- Competitive intelligence highlights the business practices followed by leading market players across geographies

KEY MARKET SEGMENTS:

The Global CRPC market segmentation is illustrated below:

Global CRPC Market By Therapy Type

- Chemotherapy
  -- Cytotoxic Agents
- Hormonal Therapy
  -- Anti-Androgens
- Immunotherapy
  -- Vaccines
- Radiotherapy
  -- Radio-Pharmaceuticals

Global CRPC Market By Drug Delivery Method

-- Oral Therapy
  -- Injectable Therapy

Global CRPC Market By Geography

-- North America
-- Europe
-- Asia-Pacific
-- LAMEA

Contents: CHAPTER 1 INTRODUCTION

1.1 Report Description
1.2 Key Benefits
1.3 Key Market Segments
1.4 Research Methodology

1.4.1 Secondary research
1.4.2 Primary research
1.4.3 Analyst tools and models
CHAPTER 2 EXECUTIVE SUMMARY

2.1 CXO Perspective
2.2 Market Beyond: What to Expect by 2025

2.2.1 Moderate growth scenario
2.2.2 Rapid growth scenario
2.2.3 Diminishing growth scenario

CHAPTER 3 MARKET OVERVIEW

3.1 Market Definition and Scope
3.2 Changing Landscape of HRPC Market
3.3 Non-Metastatic CRPC Market Perspective
3.4 Metastatic CRPC Market Pre-Chemo and Post-Chemo Settings
3.5 Xtandi vs. Zytiga Detailed Market Outlook Study of 11 Different Attributes
3.6 Key Findings

3.6.1 Top impacting factors
3.6.2 Top investment pockets
3.6.3 Top winning strategies

3.7 Competitive Intelligence of companies and their strategies
3.8 Regulations and Reimbursement Scenario
3.9 Porters Five Forces Analysis

3.9.1 High competition and fragmented nature reduces the power of the suppliers
3.9.2 Scattered nature and large number of buyers moderates the power of the buyers
3.9.3 Intense competition among existing rivalry
3.9.4 High initial cost lowers the threat of new entrants
3.9.5 Unavailability of substitutes moderates the threat of substitutes
3.9.6 Imperative deductions about the CRPC market

3.10 Market Opportunity

3.10.1 Lucrative opportunities in emerging markets
3.10.2 Untapped Non-Metastatic CRPC (nmCRPC) market opportunity

3.11 Market Share Analysis, 2014
3.12 Value Chain Analysis (Company and Product Perspective)

3.12.1 Value chain analysis by companies

3.12.1.1 Developer analysis
3.12.1.2 Manufacturer analysis
3.12.1.3 Marketer analysis
3.12.1.4 Distributor analysis
3.12.1.5 Key Takeaways

3.12.2 Value chain analysis by products

3.13 Patent Analysis
3.14 Market Dynamics

3.14.1 Drivers

3.14.1.1 Rising incidence and high mortality of prostate cancer worldwide
3.14.1.2 Limited treatment options and high unmet need for ideal treatment
3.14.1.3 Strong emerging pipeline and in-line extensions (ILE) opted for existing therapies
3.14.1.4 Growing awareness leading to increased diagnosis

3.14.2 Restraints
3.14.2.1 Limited reimbursement and coverage by payers
3.14.2.2 High costs due to combination therapies
3.14.2.3 Limited survival periods

CHAPTER 4 PIPELINE OVERVIEW

4.1 Study Objectives
4.2 Pipeline Description
4.3 Pipeline Analysis

4.3.1 Drugs in pipeline
4.3.2 Trials according to primary completion year
4.3.3 NMEs and ILEs in CRPC
4.3.4 Companies in CRPC
4.3.5 Failure rates in CRPC

4.4 Study Implications

CHAPTER 5 GLOBAL CRPC MARKET BY THERAPY TYPE

5.1 Hormonal Therapy

5.1.1 Historical milestones
5.1.2 Hormonal therapy product-wise market size and forecast
5.1.3 Key market trends
5.1.4 Key growth factors and opportunities
5.1.5 Market size and forecast

5.2 Chemotherapy

5.2.1 Historical milestones
5.2.2 Chemotherapy product-wise market size and forecast
5.2.3 Key market trends
5.2.4 Key growth factors and opportunities
5.2.5 Market size and forecast

5.3 Immunotherapy

5.3.1 Historical milestones
5.3.2 Immunotherapy product-wise market size and forecast
5.3.3 Key market trends
5.3.4 Key growth factors and opportunities
5.3.5 Market size and forecast

5.4 Radiotherapy

5.4.1 Historical milestones
5.4.2 Radiotherapy product-wise market size and forecast
5.4.3 Key market trends
5.4.4 Key growth factors and opportunities
5.4.5 Market size and forecast

CHAPTER 6 GLOBAL CRPC MARKET BY DRUG DELIVERY METHOD

6.1 Oral Route

6.1.1 Key market trends
6.1.2 Key growth factors and opportunities
6.1.3 Market size and forecast

6.2 Injectable route
6.2.1 Key market trends
6.2.2 Key growth factors and opportunities
6.2.3 Market size and forecast

CHAPTER 7 GLOBAL CRPC MARKET BY GEOGRAPHY

7.1 North America
7.1.1 Key market trends
7.1.2 Key growth factors and opportunities
7.1.3 Market size and forecast

7.2 Europe
7.2.1 Key market trends
7.2.2 Key growth factors and opportunities
7.2.3 Market size and forecast

7.3 Asia-Pacific
7.3.1 Key market trends
7.3.2 Key growth factors and opportunities
7.3.3 Market size and forecast

7.4 LAMEA
7.4.1 Key market trends
7.4.2 Key growth factors and opportunities
7.4.3 Market size and forecast

CHAPTER 8 COMPANY PROFILES

8.1 Johnson & Johnson
8.1.1 Company Overview
8.1.2 Johnson & Johnson Snapshot
8.1.3 Operating Business Segment Overview
8.1.4 Financial performance
8.1.5 Strategic moves and developments
8.1.5.1 PRINCIPAL STRATEGIES: PRODUCT LAUNCH
8.1.5.2 SECONDARY STRATEGIES: APPROVALS
8.1.5.3 OTHER STRATEGIES: ACQUISITIONS
8.1.6 SWOT analysis and strategic deductions

8.2 Dendreon Corporation
8.2.1 Company Overview
8.2.2 Dendreon Corporation Snapshot
8.2.3 Operating Business Segment Overview
8.2.4 Financial performance
8.2.5 Strategic moves and developments
8.2.6 SWOT analysis and strategic deductions

8.3 Sanofi
8.3.1 Company Overview
8.3.2 Sanofi Snapshot
8.3.3 Operating Business Segment Overview
8.3.4 Financial performance
8.3.5 Strategic moves and developments
8.3.6 SWOT analysis and strategic deductions
8.4 Bayer

8.4.1 Company Overview
8.4.2 Bayer Snapshot
8.4.3 Operating Business Segment Overview
8.4.4 Financial performance
8.4.5 Strategic moves and developments
8.4.6 SWOT analysis and strategic deductions

8.5 Astellas Pharma Inc.

8.5.1 Company Overview
8.5.2 Astellas Snapshot
8.5.3 Operating Business Segment Overview
8.5.4 Financial performance
8.5.5 Strategic moves and developments
8.5.6 SWOT analysis and strategic deductions

List Of Figures

Fig. 1 Impact Analysis Of Global CRPC Market In Moderate Growth Scenario
Fig. 2 Impact Analysis Of Global CRPC Market In Rapid Growth Scenario
Fig. 3 Impact Analysis Of Global CRPC Market In Diminishing Growth Scenario
Fig. 4 Global Hormone Refractory Prostate Cancer (HRPCA) Market Definition
Fig. 5 Evolution Of CRPC Treatment Regime
Fig. 6 Non-Metastatic CRPC Market Perspective
Fig. 7 Pre-Chemo And Post-Chemo CRPC Market Potential
Fig. 8 Detailed Market Outlook Of Xtandi Vs. Zytiga
Fig. 9 Top Impacting Factors
Fig. 10 Top Investment Pockets
Fig. 11 Top Winning Strategies Percentage Distribution
Fig. 12 Top Winning Strategies: Nature And Type
Fig. 13 Types Of Strategies Distribution
Fig. 14 Top Companies And Their Strategies
Fig. 15 Detailed Structure Of Companies And Type Of Strategies
Fig. 16 Detailed Structure Of Companies And Nature Of Strategies
Fig. 17 Porters Five Force Analysis
Fig. 18 Market Share Analysis (2014)
Fig. 19 Value Chain Analysis By Companies
Fig. 20 Value Chain Analysis By Product
Fig. 21 Manufacturing Process Of Zytiga
Fig. 22 Market Dynamics Snapshot
Fig. 23 Average Number Of Deaths Per Year And Age-Specific Mortality Rates Per 100,000 Population, UK (2010-2012)
Fig. 24 Drugs In Pipeline
Fig. 25 Trials According To Primary Completion Year
Fig. 26 Nmes And Iles In CRPC
Fig. 27 Companies In CRPC
Fig. 28 Failure Rates In CRPC
Fig. 29 Key Financials Of Johnson & Johnson $ Million (2012-2014)
Fig. 30 Financial Revenues By Segments (2014)
Fig. 31 Financial Revenues By Geography (2014)
Fig. 32 Swot Analysis Of Johnson & Johnson
Fig. 33 Key Financials Of Dendreon Corporation $ Thousands (2011-2013)
Fig. 34 Financial Revenues By Geography (2013)
Fig. 35 Swot Analysis Of Dendreon Corporation
Fig. 36 Key Financials Of Bayer $ Millions (2012-2014)
Fig. 37 Financial Revenues By Segments (2014)
Fig. 38 Financial Revenues By Geography (2014)
Fig. 39 Swot Analysis Of Sanofi
Fig. 40 Key Financials Of Bayer $ Millions (2012-2014)
Fig. 41 Financial Revenues By Segments (2014)
List Of Tables

Table 1 Global CRPC Market, Moderate Growth Scenario, By Geography, 2020-2025 ($Million)
Table 2 Global CRPC Market, Rapid Growth Scenario, By Geography, 2020-2025, ($Million)
Table 3 Global CRPC Market, Diminishing Growth Scenario, By Geography, 2020-2025, ($Million)
Table 4 Clinical And Non-Clinical Attributes Of Xtandi And Zytiga
Table 5 Reimbursement Pattern Of CRPC Drugs
Table 6 Competitive Intelligence Of Drug Innovators
Table 7 Reimbursement Pattern Of CRPC Drugs
Table 8 Market Share And Revenue Of CRPC Drug Innovators
Table 9 Looming Off-Patents Of CRPC Drugs
Table 10 Fda Approved Treatments For Cprc And Their Survival Benefits
Table 11 Emerging Pipeline And In-Line Extensions For Cprc
Table 12 Reimbursement And Fda Approval For Cprc Drugs
Table 13 Pipeline For Cprc Drugs
Table 14 Global CRPC Market, By Therapy Types, 2014-2020, ($Million)
Table 15 Hormonal Therapy Drugs And Their Revenues In 2014
Table 16 Global Hormonal Therapy Products Market, By Type, 2014-2020, ($Million)
Table 17 Global Hormonal Therapy Drugs Market, By Geography, 2014-2020, ($Million)
Table 18 Chemotherapy Drugs And Their Revenues In 2014
Table 19 Global Chemotherapy Drug Market, By Type, 2014-2020, ($Million)
Table 20 Global Chemotherapy Drugs Market, By Geography, 2014-2020, ($Million)
Table 21 Immunotherapy Drugs And Their Revenues In 2014
Table 22 Global Immunotherapy Drug Market, By Type, 2014-2020, ($Million)
Table 23 Global Immunotherapy Drugs Market, By Geography, 2014-2020, ($Million)
Table 24 Radiotherapy Drugs And Their Revenues In 2014
Table 25 Global Radiotherapy Drug Market, By Type, 2014-2020, ($Million)
Table 26 Global Radiotherapy Drugs Market, By Geography, 2014-2020, ($Million)
Table 27 Global Oral Therapy Market, By Geography, 2014-2020, ($Million)
Table 28 Global Injectable Therapy Market, By Geography, 2014-2020, ($Million)
Table 29 Global CRPC Market, By Geography, 2014-2020, ($Million)
Table 30 CRPC Treatments Approved In United States
Table 31 North America CRPC Market, By Therapy Types, 2014 - 2020, ($Million)
Table 32 High Incidence Rates At Diagnosis In Eu-5 Nations As Compared To United States
Table 33 Europe CRPC Market, By Therapy Types, 2014 - 2020, ($Million)
Table 34 CRPC Treatments Available And Consideration Factors In Asia Pacific Region
Table 35 High Incidence Rates At Diagnosis In Asia Pacific Region Result Of Low Psa Screening
Table 36 Asia Pacific CRPC Market, By Therapy Types, 2014 - 2020, ($Million)
Table 37 Incidence And Deaths From Prostate Cancer In Latin America
Table 38 Lamea CRPC Market, By Therapy Types, 2014 - 2020, ($Million)
Table 39 Company Snapshot Of Johnson & Johnson
Table 40 Johnson & Johnson Operating Segments
Table 41 Company Snapshot Of Dendreon Corporation
Table 42 Dendreon Corporation Operating Segments
Table 43 Company Snapshot Of Sanofi
Table 44 Sanofi Operating Segments
Table 45 Company Snapshot Of Bayer
Table 46 Bayer Operating Segments
Table 47 Company Snapshot Of Astellas
Table 48 Astellas Operating Segments

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