PharmaPoint: Gastric and Gastroesophageal Junction Adenocarcinoma - Global Drug Forecast and Market Analysis to 2024

Description:

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Summary

Gastric and gastroesophageal junction adenocarcinoma (G/GEJAC) represents the majority of gastric cancer cases worldwide. It is the fifth most diagnosed cancer globally, and the third most common cause of cancer death in the world. The major treatments for G/GEJAC are chemotherapy-based, but targeted therapies such as HER2 and angiogenesis inhibitors have been approved and are being added to chemotherapy regimens since 2010 and 2014, respectively.

GlobalData estimates the 2014 sales for G/GEJAC at approximately $1.13 billion across the 8MM covered in this report. The market is expected to reach $4.39 billion in 2024 at a CAGR of 14.6%. This growth will be mainly driven by the approval and uptake of premium-priced products, such as Eli Lilly's Cyramza (ramucirumab) and PD-1-targeting mAbs, Merck & Co.'s Keytruda (pembrolizumab) and BMS' Opdivo (nivolumab). We expect, by the end of the forecast period, Cyramza to dominate the G/GEJAC market with an overall 37% share of the G/GEJAC market.

The G/GEJAC pipeline is strong; however, we expect many of these drugs to launch only in Japan and China, limiting their outlook. For the pipeline drugs that are in a global development, Roche's Perjeta (pertuzumab) and Merck & Co.'s Keytruda are the most promising. While the HER2-positive segment of the G/GEJAC will be dominated by Roche over the forecast period, GlobalData projects there will be opportunities for companies to develop novel therapeutics targeting the HER2-negative first-line setting.

Highlights

Key Questions Answered

- What will be the impact of the new anti-PD-1 inhibitors and their projected label expansions on the G/GEJAC market sales? Given the recent reports on clinical efficacy of these pipeline drugs, there is a good deal of potential in the G/GEJAC space for anti-PD-1 inhibitors over the forecast period.
- As the HER2-positive segment of the G/GEJAC market is dominated by Roche, pharmaceutical companies aim to establish their foothold in the underserved HER2-negative space. What R&D strategies are being pursued by drug makers to stand out?
- The development of drugs for G/GEJAC has been slow, especially after the failure of Phase III trials of multiple pre-2014 pipeline agents. Therefore, there are considerable high unmet needs within the indication. What are the main unmet needs in this market? Will the drugs under development fulfill the unmet needs of the G/GEJAC market?

Key Findings

- One of the main drivers of the enormous expansion of the G/GEJAC market will be the launch of premium-priced metastatic therapies, such as HER2-targeted therapy Perjeta, and anti-PD-1 immunotherapies Keytruda and Opdivo. The uptake of recently-approved Cyramza and its projected label expansion into the HER2-negative first-line setting will also be key. These drugs will extend treatment duration and will be added onto the current standard-of-care regimens.
- Key patent expiry of Herceptin across the major markets and subsequent biosimilar entries expected starting in 2017 represent a major barrier of the growth of the G/GEJAC market. We expect trastuzumab biosimilars to occupy a fifth of total molecule sales in 2024, the end of the forecast period.
- Companies are focusing on the development of therapies for the second-line treatment and for HER2-negative patients in the first line, trying to avoid excessive competition with the current standard of care.
- One of the largest unmet needs is efficacious perioperative and postoperative treatment options for resected patients to prevent disease recurrence. Currently, no company-sponsored trials are planned to address this unmet need.
Scope

- Overview of G/GEJAC, including epidemiology, etiology, pathophysiology, symptoms, diagnosis, and disease management.
- Annualized G/GEJAC therapeutics market revenue, cost of therapy per patient, and treatment usage patterns in seven patient segments (including adjuvant, HER2-positive and HER2-negative), forecast from 2014 to 2024.
- Key topics covered include strategic competitor assessment, market characterization, unmet needs, clinical trial mapping and implications for the G/GEJAC therapeutics market.
- Pipeline analysis: comprehensive data assessing emerging trends and mechanisms of action under development for different lines of therapy. The most promising candidate in Phase III development is profiled.
- Analysis of the current and future market competition in the global G/GEJAC therapeutics market. Insightful review of the key industry drivers, restraints and challenges. Each trend is independently researched to provide qualitative analysis of its implications.

Reasons to buy

The report will enable you to -
- Develop and design your in-licensing and out-licensing strategies through a review of pipeline products and technologies, and by identifying the companies with the most robust pipeline.
- Develop business strategies by understanding the trends shaping and driving the global G/GEJAC therapeutics market.
- Drive revenues by understanding the key trends, innovative products and technologies, market segments, and companies likely to impact the global G/GEJAC therapeutics market in the future.
- Formulate effective sales and marketing strategies by understanding the competitive landscape and by analysing the performance of various competitors.
- Identify emerging players with potentially strong product portfolios and create effective counter-strategies to gain a competitive advantage.
- Organize your sales and marketing efforts by identifying the market categories and segments that present maximum opportunities for consolidations, investments and strategic partnerships.

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