

## **OVERVIEW**

- Catalyst
- Summary

## **EXECUTIVE SUMMARY**

- Strategic scoping and focus
- Datamonitor key findings
- Related reports

## **MARKET DEFINITION**

- Market definition for colon cancer
- Forecast methodology and assumptions
  - Methodology flow
  - Patent expiries
  - New product launches
- Additional forecast methodology

## **MARKET OVERVIEW AND CONTEXT**

- Cancer therapies included in this report
- Current and future market dynamics overview
  - The colon cancer market will experience a modest increase in sales over the forecast period
  - Market entry of new drugs will help maintain the value of the colon cancer market
  - The commercial value of targeted therapies will supersede cytotoxic therapies by 2020
  - New product launches will only impact the metastatic colon cancer setting
  - The US will remain the most lucrative market over the forecast period despite a decrease in value
  - The Japanese colon cancer market is the second largest and will continue to grow
  - Colon cancer across the five major EU markets will increase in value following new drug approvals

## **PRODUCT FORECASTS**

- Molecule dynamics
  - Bevacizumab will become the leading molecule by 2020 following patent expiry of branded drugs
- Avastin (bevacizumab; Genentech/Roche/Chugai)
  - Forecast assumptions
  - Avastin forecast 2011–20
- Erbix (cetuximab; Eli Lilly/Bristol-Myers Squibb/Merck KGaA)
  - Forecast assumptions
  - Erbix forecast 2011–20
- Irinotecan (generic)
  - Forecast assumptions
  - Irinotecan forecast 2011–20
- Eloxatin (oxaliplatin; Sanofi) and Oxaliplatin (generic)

|  |                              |
|--|------------------------------|
|  | Forecast assumptions         |
|  | Eloxatin forecast 2011–20    |
| Brivanib (BMS-582664; Bristol-Myers Squibb)      |                              |
|  | Forecast assumptions         |
|  | Brivanib forecast 2011–20    |
| Imprime PGG (Biothera)                           |                              |
|  | Forecast assumptions         |
|  | Imprime PGG forecast 2011–20 |
| Ramucirumab (Eli Lilly)                          |                              |
|  | Forecast assumptions         |
|  | Ramucirumab forecast 2011–20 |
| Regorafenib (Bayer)                              |                              |
|  | Forecast assumptions         |
|  | Regorafenib forecast 2011–20 |
| Zaltrap (afibercept/VEGF-Trap; Regeneron/Sanofi) |                              |
|  | Forecast assumptions         |
|  | Zaltrap forecast 2011–20     |

## **BIBLIOGRAPHY**

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| Journal papers      |
| Websites            |
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| Volume and value forecast methodology |
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