Cancer Market Outlook to 2015: Competitive Landscape, Market Size, Pipeline Analysis, and Growth Opportunities

Introduction

The report provides epidemiological analysis, and forecasts prevalence of the major cancer indications turning 2009-2015, including lung, breast, colorectal, and ovarian cancer markets. Also included are detailed analyses of the clinically differentiated products in the cancer pipeline by indication, and sales forecasts for key R&D pipeline products in the global cancer market.

Scope

- Strategic & growth analysis of leading pharmaceutical companies, including their sales by drug class, currently marketed products, and new products in R&D.
- Detailed analysis of major classes of cancer treatments, including antineoplastics and cytotoxic hormone therapies.
- Analysis of the clinically differentiated products in cancer pipeline by indication, and sales forecasts of key R&D pipeline products.

Research and analysis highlights

Antineoplastics formed the leading drug class for cancer treatment. While competition is strong within the antineoplastic market, four drugs dominated the global antineoplastics market - Roche’s Avastin (bevacizumab), MabThera (rituximab), and Herceptin (trastuzumab), and Novartis's Glivec (imatinib).

Cytostatic hormone therapies formed the other major drug class in the global cancer market, which was led by cytostatic aromatase inhibitors, cytostatic gonad hormone analogs and cytostatic anti-androgens. Arimidex and Femara remained the leading drugs in cytostatic hormone therapy registering Y-o-Y growth of around 3% and 15% respectively in 2009.

In 2009, monoclonal antibodies (mAbs) accounted for the majority of sales, achieving almost 30% share among the top 10 brands in the global cancer market. This was largely driven by the commercial success of the mAb brands: MabThera, Avastin, and Herceptin.
Key reasons to purchase this research

• Develop insight into patient potential with coverage of cancer indications, 7 major markets & the top 10 players
• Understand how recent events are affecting the performance of major products & how their marketers are confronting competitive changes
• Gain up-to-date competitive intelligence across the cancer indications and understand the major issues affecting key pharmaceutical/biotech players
• Understand which indications have potential to provide franchise growth & how pharmaceutical companies are attempting to exploit these opportunities
• Compare pharmaceutical marketers franchises across indications & understand how market share of leading companies will change over the next 6 years
**Table of Contents**

About Business Insights 2
Disclaimer 2
Executive summary 15
Overview and epidemiology of cancer indications 15
Global market analysis 16
Pipeline analysis 16
Competitive landscape 17
Chapter 1 Scope and methodology 19
Scope 19
Key cancer indications covered in this report 19
Methodology 20
Chapter 2 Overview and epidemiology of cancer indications 21
Summary 21
Introduction 22
Overview 22
Cancer risk factors 22
Lung cancer 24
Overview 24
Diagnosis, treatment and management 25
Epidemiology 26
NSCLC 26
SCLC 27
Forecast epidemiology 28
NSCLC 28
SCLC 29
Colorectal cancer 31
Overview 31
Diagnosis, treatment and management 31
Epidemiology 32
Forecast epidemiology 33
Breast cancer 35
Overview 35
Diagnosis, treatment and management 35
Epidemiology 36
Forecast epidemiology 37
Ovarian cancer 39
Overview 39
Diagnosis, treatment and management 40
Epidemiology 40
Forecast epidemiology 41
Uterine and cervical cancer 43
Overview 43
Diagnosis, treatment and management 43
Epidemiology 44
Forecast epidemiology 44
Leukemia 46
Overview 46
Diagnosis, treatment and management 47
Epidemiology 47
Forecast epidemiology 48
Prostate cancer 50
Overview 50
Diagnosis, treatment and management 50
Epidemiology 51
Forecast epidemiology 52
Pancreatic cancer 54
Overview 54
Diagnosis, treatment and management 54
Epidemiology 55
Forecast epidemiology 55
Lymphomas 57
Overview 57
Diagnosis, treatment and management 57
Epidemiology 58
Forecast epidemiology 59
Head and neck cancer 61
Overview 61
Diagnosis, treatment and management 62
Epidemiology 63
Forecast epidemiology 63
Chapter 3 Global market analysis 65
Summary 65
Introduction 65
Market analysis by country 66
Market analysis by drug class 68
Leading brand dynamics 69
Avastin (bevacizumab) – Roche 70
MabThera (rituximab) – Roche 72
Herceptin (trastuzumab) – Roche 73
Glivec/Gleevec (imatinib) – Novartis 74
Taxotere (docetaxel) – Sanofi-Aventis 75
Leading brands by type of cancer 76
Key recent events in the cancer market 79
Antineoplastics 82
Competitive dynamics of antineoplastics 82
Leading antineoplastic brands 84
Antineoplastic mAb market analysis 85
Market dynamics 85
Key brands analysis 85
Antineoplastic protein kinase inhibitors 87
Market dynamics 87
Key brands analysis 87
Vinca alkaloid market analysis 88
Market dynamics 88
Key brands analysis 88
Anti-metabolites 88
Market dynamics 88
Key brands analysis 88
Platinum compounds 89
Market dynamics 89
Key brands analysis 89
Antineoplastic sales forecast 90
Cytostatic hormonal therapies 91
Competitive dynamics of cytostatic hormonal therapies 91
Leading brands of cytostatic hormonal therapies 92
Cytostatic aromatase inhibitors market analysis 93
Market dynamics 93
Key brands analysis 94
Cytostatic gonadotrophin-releasing hormone analog market analysis 95
Market dynamics 95
Key brands analysis 95
Cytostatic anti-androgens 96
Market dynamics 96
Key brands analysis 96
Cytostatic hormonal therapy sales forecast 97
Global cancer market sales forecast 98
Generic cancer market 99
Chapter 4 Pipeline analysis 103
Summary 103
Introduction 104
Key trends in R&D 104
Targeted therapies are changing the treatment regimen of cancer 104
Cancer vaccines enhance the body's immune response 105
Pricing is becoming a major issue for cancer patients 105
Combination treatments are becoming the treatment of choice 106
Oncology pipeline 107
Leading drugs in development 108
Recently approved/marketed drugs 110
Afinitor (everolimus) – Novartis 110
Arzerra (ofatumumab) – GSK/Genmab 111
Votrient (pazopanib) – GSK 114
Provenge (sipuleucel-T) – Dendreon 116
Trastuzumab-DM1 (T-DM1) – Roche 117
Phase III compounds 120
Stimuvax (emepepimut- S) – Merck Serono 120
Ipilimumab (MDX-010) – Bristol Myers Squib (BMS) 122
Omnitarg (pertuzumab) – Roche 124
Abiraterone – Johnson & Johnson (J&J) 126
BSI-201(iniparib) – Sanofi-Aventis 128
Pipeline forecast of leading drugs in development 130
Factors affecting forecasts 130
Chapter 5 Competitive landscape 131
Summary 131
Introduction 132
Sales performance of leading players 132
Roche 134
Sales focus by drug class 135
Regional sales distribution 135
Marketed product portfolio 136
Pipeline analysis 138
Strategic and growth analysis 140
Drivers of growth 140
Resistors of growth 141
Novartis 142
Sales focus by drug class 142
Regional sales distribution 143
Marketed product portfolio 144
Pipeline analysis 145
Strategic and growth analysis 147
Drivers of growth 147
Resistors of growth 147
Sanofi-Aventis 148
Sales focus by drug class 148
Regional sales distribution 149
Marketed product portfolio 150
Pipeline analysis 151
Strategic and growth analysis 153
Drivers of growth 153
Resistors of growth 154
AstraZeneca 154
Sales focus by drug class 154
Regional sales distribution 155
Marketed products portfolio 156
Pipeline analysis 157
Strategic and growth analysis 158
Drivers of growth 158
Resistors of growth 159
Eli Lilly 160
Sales focus by drug class 160
Regional sales distribution 160
Marketed products portfolio 161
Pipeline analysis 162
Strategic and growth analysis 163
Drivers of growth 163
Resistors of growth 164
Competitive positioning of top true generic players in the cancer market 165
Appendix 167
IMS data 167
Antineoplastic and immunomodulating agents 167
L1: Antineoplastics 167
L2: Cytostatic hormone therapy 167
Forecast factors 167
Epidemiology forecast: 167
Market forecast: 167
Glossary 168
Abbreviations 168
Trial expansions 171

Table of figures
Figure 1: Treatment of lung cancer by stage 25
Figure 2: Types of breast cancers 35
Figure 3: Types of leukemia 46
Figure 4: Chemotherapy options for Hodgkin's disease 58
Figure 5: Head and neck cancers and their risk factors 62
Figure 6: 7MM cancer market share by region (%), 2009 67
Figure 7: Relative positions of the 7MM in the global cancer market, 2009 68
Figure 8: Current pharmacological treatment options for cancer 107
Figure 9: Oncology pipeline by indication and stage of development, 2010 108
Figure 10: Key drugs in late-stage development or that have been recently launched 109
Figure 11: Contribution of the top 10 players to growth of the global cancer market, 2008–09 134
Figure 12: Roche's cancer sales by drug class ($m), 2009 135
Figure 13: Novartis' cancer sales by drug class ($m), 2009 143
Figure 14: Sanofi-Aventis' cancer sales by drug class ($m), 2009 149
Figure 15: AstraZeneca's cancer sales by drug class ($m), 2009 155
Figure 16: Competitive positioning of the top 10 true generic players in the 7MM, 2009 166

Table of tables
Table 1: Estimated prevalence of NSCLC across the seven major markets, 2009 27
Table 2: Estimated prevalence of SCLC across the seven major markets, 2009 28
Table 3: Forecast epidemiology of NSCLC across the seven major markets, 2009-15 29
Table 4: Forecast epidemiology of SCLC across the seven major markets, 2009-15 30
Table 5: Estimated prevalence of colorectal cancer across the seven major markets, 2009 33
Table 6: Forecast epidemiology of colorectal cancer across the seven major markets, 2009-15 34
Table 7: Estimated prevalence of breast cancer across the seven major markets, 2009 37
Table 8: Forecast epidemiology of breast cancer across the seven major markets, 2009-15 38
Table 9: Estimated prevalence of ovarian cancer across the seven major markets, 2009
Table 10: Forecast epidemiology of ovarian cancer across the seven major markets, 2009-15
Table 11: Estimated prevalence of uterine and cervical cancer across the seven major markets, 2009
Table 12: Forecast epidemiology of uterine and cervical cancer across the seven major markets, 2009-15
Table 13: Estimated prevalence of leukaemia across the seven major markets, 2009
Table 14: Forecast epidemiology of leukemia across the seven major markets, 2009-15
Table 15: Estimated prevalence of prostate cancer across the seven major markets, 2009
Table 16: Forecast epidemiology of prostate cancer across the seven major markets, 2009-15
Table 17: Estimated prevalence of pancreatic cancer across the seven major markets, 2009
Table 18: Forecast epidemiology of pancreatic cancer across the seven major markets, 2009-15
Table 19: Estimated prevalence of lymphomas across the seven major markets, 2009
Table 20: Forecast epidemiology of lymphomas across the seven major markets, 2009-15
Table 21: Estimated prevalence of head and neck cancers across the seven major markets, 2009
Table 22: Forecast epidemiology of head and neck cancers across the seven major markets, 2009-15
Table 23: Global cancer market by geography ($m), 2009
Table 24: Breakdown of the global cancer market by drug class($m), 2009
Table 25: Leading brands in the global cancer market ($m), 2009
Table 26: Leading brands in breast cancer ($m), 2009 77
Table 27: Leading brands in colon cancer ($m), 2009 77
Table 28: Leading brands in prostate cancer ($m), 2009 78
Table 29: Leading brands in lung cancer ($m), 2009 78
Table 30: Breakdown of the global antineoplastic market by drug class ($m), 2009 83
Table 31: Leading brands in global antineoplastics market ($m), 2009 84
Table 32: Antineoplastic sales forecast ($m), 2009-15 90
Table 33: Breakdown of the global cytostatic hormonal therapies by drug class ($m), 2009 92
Table 34: Leading brands in global cytostatic hormonal therapies market ($m), 2009 93
Table 35: Cytostatic hormonal therapy sales forecast ($m), 2009-15 98
Table 36: Global cancer market sales forecast ($m), 2009-15 99
Table 37: Classification of the generic cancer market in the 7MM ($m), 2009 100