

## **OVERVIEW**

- Catalyst
- Summary

## **EXECUTIVE SUMMARY**

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

## **MARKET DEFINITION**

- Market definition for cancer therapies
  - Antihormonal therapies by ATC class
  - Cytotoxic therapies by ATC class
  - Targeted therapies by ATC class
- Forecast methodology and assumptions
  - Methodology flow
  - Patent expiries
- Additional forecast methodology

## **MARKET OVERVIEW AND CONTEXT**

- Cancer therapy brands included in this report
- Seven major market top 20 oncology therapy brands
  - The top 20 across the seven major markets will be dominated by targeted therapies by 2020
- US top 20 oncology therapy brands
  - The US top 20 will fragment as more targeted therapies enter the market
- Japan top 20 oncology therapy brands
  - Patent expiries will have a lower impact on the Japanese top 20
- Five major EU markets top 20 oncology therapy brands
  - Branded drugs will resist generic erosion leading to smaller changes in the top 20
- France top 20 oncology therapy brands
  - France maintains the largest top 20 market in the five major EU markets over the forecast period
- Germany top 20 oncology therapy brands
  - Price cuts and high generic erosion will decrease the size of Germany's top 20 brands
- Italy top 20 oncology therapy brands
  - Brand loyalty will maintain the majority of the top 20
- Spain top 20 oncology therapy brands
  - Price cuts will limit the growth of targeted therapies in the top 20
- UK top 20 oncology therapy brands
  - The UK's strict cost-effective reimbursement policy will continue to limit sales of the top 20 brands

## **PRODUCT FORECASTS**

- Brand dynamics

Roche's monoclonal antibody franchise will comprise the top three in 2010 and 2020

Avastin (bevacizumab; Genentech/Roche/Chugai)

Forecast assumptions

Avastin forecast 2010–20

Rituxan (rituximab; Biogen Idec/Genentech/Roche/Chugai)

Forecast assumptions

Rituxan forecast 2010–20

Herceptin (trastuzumab; Genentech/Roche/Chugai)

Forecast assumptions

Herceptin forecast 2010–20

Gleevec/Glivec (imatinib; Novartis)

Forecast assumptions

Gleevec forecast 2010–20

Revlimid (lenalidomide; Celgene)

Forecast assumptions

Revlimid forecast 2010–20

Erbix (cetuximab; Eli Lilly/Bristol-Myers Squibb/Merck KGaA)

Forecast assumptions

Erbix forecast 2010–20

Lupron (Leuprolide; Takeda/Abbott)

Forecast assumptions

Lupron forecast 2010–20

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