

MARKET REPORT



Colorectal Cancer Therapeutics in Major Developed Markets to 2020 - Increased Uptake of High Priced Drugs to Offset the Impact of Generics

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Summary

GBI Research, the leading business intelligence provider, has released its latest research, “Colorectal Cancer Therapeutics in Major Developed Markets to 2020 - Increased Uptake of High Priced Drugs to Offset the Impact of Generics”, which provides in-depth analysis of the Colorectal Cancer (CRC) therapeutics market in the eight major geographies of the US, Canada, the UK, France, Germany, Spain, Italy and Japan. The report provides an estimation of the market size for 2013, along with market forecast until 2020. It also covers disease epidemiology, treatment algorithms, treatment patterns, in-depth pipeline analysis, and deal analysis.

The CRC therapeutics market in the eight major markets is expected to grow at a Compound Annual Growth Rate (CAGR) of 1.8% to \$9.4 billion by 2020. The US had the largest market share in 2013, equivalent to a global share of 44.1%, followed by Japan and Germany with 14.7% and 11.9% respectively. Spain had the lowest market share of the leading eight at 4.1%. All markets covered in the report are expected to witness a slower growth rate than Japan, which will grow at a CAGR of 5%. However, this moderate growth will be stymied by the expected uptake of lower-priced biosimilar versions of bevacizumab and cetuximab due to the expiration of the patents of Avastin and Erbitux in the latter half of the forecast period. Also expected is the launch of generic versions of capecitabine, which will also affect the market. However, this will be offset by the launch of premium-priced emerging therapies. Stivarga is expected to be one of the biggest drivers of growth in the CRC market, primarily due to its expected line extension in the first-line metastatic setting as a maintenance treatment for patients with resected liver metastases. The launch of Lonsurf (TAS-102), approved in Japan in 2014, in the third- and fourth-line settings will further increase the pharmacological treatment rates in these lines, which will give patients a more tolerable alternative to Stivarga. The moderate uptake of other late-stage pipeline products, panitumumab and Xilonix, following their expected approval, is expected to drive additional growth within this market.

The CRC pipeline is highly robust, with potential drug candidates across various Phases of clinical development. With nearly 400 active pipeline molecules, the majority of the investigational drug candidates are being evaluated for the treatment of CRC in advanced stages, either as first-line or second-line therapies. The current investigational pipeline candidates include new combination therapies and targeted therapies, as well as promising immunotherapies and chemotherapy drug candidates. As well as these active progressing pipeline molecules, the pipeline also includes nearly 180 molecules that are either inactive or discontinued.

Scope

The report analyzes treatment usage patterns, market characterization, the pipeline, and key licensing and co-development deals in the eight major markets: the US, the UK, France, Germany, Spain, Italy, Japan and Canada. It includes -

- A brief introduction to CRC, including the disease’s pathogenesis, etiology, diagnosis and treatment algorithms
- In-depth analysis of currently marketed drugs for CRC, examining their safety, efficacy, treatment patterns and

strengths/weaknesses and including a heat map that compares the drugs in terms of safety and efficacy

- A comprehensive review of the pipeline for CRC, including individual analysis of a number of late-stage pipeline drugs that are likely to enter the market during the forecast period; the pipeline is analyzed on the basis of Phase distribution, molecule type, program type, mechanism of action and molecular target
- Additional in-depth analysis of pipeline drug clinical trials by Phase, trial size, trial duration and program failure rate for each molecule type
- Multi-scenario forecast data of the market to 2020, taking into account how the market may be affected by the introduction of new drugs, the expiry of key patents on current drugs and the changes in disease epidemiology across the key developed markets
- Discussion of the drivers of and barriers to market growth
- In-depth analysis of all licensing and co-development deals that have occurred in the CRC market since 2006

Reasons to buy

The report will enhance your decision-making capability by allowing you to -

- Understand the CRC pipeline and the factors that indicate that it is becoming more innovative
- Examine detailed profiles of promising pipeline products and gain an insight into how they are likely to compete in the market and who their main competitors will be
- Follow the trends in CRC clinical trial size and duration in relation to industry averages and assess the potential risk of future developmental programs according to mechanism of action by considering the recorded clinical trial failure rates
- Observe the potential growth patterns expected for the CRC market over the forecast period, identify which countries are expected to make the biggest contribution to this growth, and devise a more effective country strategy through an understanding of key drivers and barriers in the CRC market
- Accelerate and strengthen your market position by identifying key companies for strategic partnerships

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