

MARKET REPORT



Frontier Pharma: Hematological Cancers - Highly Innovative Pipeline Continues Trend towards Targeted, Patient-Specific Therapies

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Summary

Hematological malignancies are a class of cancer that affect the blood, lymph nodes and bone marrow, and include numerous forms of leukemia, lymphoma and myeloma. Hematological malignancies constituted 9% of all newly diagnosed malignancies in the US in 2011, with data indicating that lymphomas are more prevalent than leukemia or myeloma. Excluding acute lymphocytic leukemia and Hodgkin's lymphoma, these types of malignancy are generally associated with increasing age. Therefore, considering the aging population globally, this class of malignancy is likely to become more prevalent.

The report assesses first-in-class innovation in the hematological cancer pipeline, highlighting key trends in first-in-class product distribution. Analysis reveals that the hematological cancer pipeline is among the most innovative in the industry, with 463 first-in-class products, representing 45.3% of the pipeline with a disclosed molecular target.

The first-in-class targets in the pipeline are numerous and varied in nature. Cancer immunotherapies are the most common, with a total of 128 across all stages of development, followed by the signal transduction group of targets. The most commercially successful targeted drugs in the market fall into these two categories, including Rituxan (a cancer immunotherapy) and Gleevec (a signal transducer). The other target families have much fewer first-in-class products, reflecting the strong interest in cancer immunotherapies and targets implicated in signal transduction.

Over the past 15 years, the treatment of hematological malignancies has changed significantly, with the development of targeted therapies. These developments have been based on the growing understanding of the signaling pathways involved in disease pathogenesis. A notable example is the approval of Rituxan in 1997, which is used to treat multiple types of hematological malignancies, including Non-Hodgkin's lymphoma. Analysis indicates that the current pipeline is following this trend of focusing on innovative, targeted therapies.

Scope

The hematological cancers market is characterized by commercially successful therapies.

- Which classes of drug dominate the market?
- What additional benefits have newly approved therapies brought to the market?

The pipeline contains a range of molecule types and molecular targets, with a strong emphasis on targeted therapies, as opposed to chemotherapeutic agents.

- Which molecular targets appear most frequently in the pipeline?
- To what degree is the pipeline penetrated by first-in-class innovation?

- Which target families have the most first-in-class products?

First-in-class products differ substantially in their clinical potential, based on their alignment to disease-causing pathways.

- How well are first-in-class targets aligned to known disease-causing pathways?
- Which targets are specifically found in early-stage development?
- Which are the most promising first-in-class targets in early-stage development?

There have been 284 licensing deals and 238 co-development deals pertaining to hematological cancer products since 2006.

- Which territories show the most deal activity?
- What were the trends in deal completion by product stage of development?
- Which of the first-in-class products in development are not currently involved in a licensing or co-development deal, and therefore represent investment opportunities?

Reasons to buy

This report will allow you to -

- Understand the current clinical and commercial landscape. It includes a comprehensive study of disease pathogenesis, diagnosis, prognosis and the treatment options available.
- Visualize the composition of the hematological cancers market in terms of dominant molecule types and targets, highlighting what the current unmet needs are and how they can be addressed. This knowledge allows a competitive understanding of gaps in the current market.
- Analyze the hematological cancers pipeline and stratify by stage of development, molecule type and molecular target. There are strong signs in the pipeline that the industry is seeking novel approaches to treating hematological cancers.
- Assess the therapeutic potential of first-in-class targets. Using a proprietary matrix, first-in-class products have been assessed and ranked according to clinical potential. Promising early-stage targets have been reviewed in greater detail.
- Identify commercial opportunities in the hematological cancers deals landscape by analyzing trends in licensing and co-development deals and producing a curated list of hematological cancer therapies that are not yet involved in deals, and may be potential investment opportunities.

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