The Oncolytic Virus Landscape 2017: an analysis of pipeline, stakeholders, deals, industry trends & opportunities
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The field of oncolytic viruses was quite dormant in the first decade of the 2000s, characterized by slow clinical progress due to hypercautiousness and low, albeit steady, investments. The takeover of BioVex by Amgen in late 2011, worth up to US$ 1 bln, has woken up the field and became a game changer together with the 2015 approval of the first oncolytic virus Imlygic developed by BioVex in regulated markets. In addition, it was increasingly recognized that oncolytic viruses not only were able to directly lyse cancer cells, but they also „freed“ tumor specific neoantigens, indirectly acting as a cancer vaccine.

However, the efficacy of oncolytic viruses still was modest, but can be improved when combined with immune checkpoint inhibitors. This lead to an increased partnering interest of the major immuno-oncology (I-O) players, but also of investors who view oncolytic viruses as a must be for I-O combination regimens. As a consequence, total venture equity and private investments into oncolytic virus companies in 2016 was nearly 17-fold higher than in the year 2010.

Optimization of oncolytic viruses is ongoing and new constructs intend to solve some of the open problems regarding the way of administration (intratumoral vs systemic), higher cancer cell specific replication capacity, and longer persistence in vivo. Based on experience with several virus families over the last decades, a few virus families crystallized as well suitable backbones to carry more and more transgenes to express proteins or even single chain antibodies. This would position oncolytic viruses as independent therapeutics and could compete with immuno-oncology compounds and cancer vaccines.

This report „The Oncolytic Virus Landscape 2017: an analysis of pipeline, stakeholders, deals, industry trends & opportunities“ as of January 2017 brings you up-to-date regarding key players, key technologies, Oncolytic Virus projects, business deals and private and public financing rounds. The report analyzes the Oncolytic Virus pipeline and stakeholders in the field, especially among Big Pharma/Biotech and technology companies. The report highlights the value of oncolytic viruses in terms of partnering terms and conditions, venture and private financing and (initial) public offerings.

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This report has been built in a bottom-up way by desktop search to identify and describe company, product, technology and business/financing profiles which then were evaluated and analyzed with a final outlook describing perspectives with challenges and opportunities.
What will you find in the report?

- Selection of oncolytic virus strains
- Design & construction of engineered oncolytic viruses
- Herpes simplex virus (HSV) family
- Adenovirus-based oncolytic viruses
- Oncolytic Vaccinia Viruses, Vesicular Stomatitis Viruses, Newcastle Disease Viruses & Others
- Profiles of 45 oncolytic viruses in development and on the market;
- Analysis of the pipeline of oncolytic viruses
- Comparison of clinical development paths
- Combination trials of oncolytic viruses with immune checkpoint inhibitors
- Combination with other anticancer therapeutics
- Armed oncolytic viruses
- Tumor indication of oncolytic viruses under study
- Way of administration of oncolytic viruses in clinical studies
- Profiles of 45 companies active in the field of oncolytic viruses
- Pharma & Biotech vs four generations of oncolytic virus companies
- Stakeholder analysis within each peer group
- Sources of oncolytic virus technologies
- Sources of non-dilutive financing including partnering deals
- Analysis of venture and private equity financing rounds
- Listing on stock exchange for access to capital
- Mergers and acquisition in the field
- Trends in the further research and development of oncolytic viruses

Who will benefit from the report?

- Venture capital, private equity and investment managers;
- Financial analysts;
- CFO;
- Business development and licensing (BDL) specialists;
- Marketing managers;
- CEO, COO and managing directors;
- Corporate strategy, product and portfolio analysts and managers;
- Chief Technology Officer;
- Cell technology and manufacturing specialists;
- Clinical and preclinical development specialists.

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