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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Table Of Contents for The Oncolytic Virus Landscape 2017: an analysis of pipeline, stakeholders, deals, industry trends & opportunities [Report Updated: 01-01-2016]

- The Oncolytic Virus Landscape 2017: an analysis of pipeline, stakeholders, deals, industry trends & opportunities
- Table of Contents
- Executive Summary
- Introduction & Overview
- Selection, Design & Construction of Oncolytic Viruses
  - 3.1 Herpes Simplex Virus (HSV) – based Oncolytic Viruses
  - 3.2 Adenoviruses – based Oncolytic Viruses
  - 3.3 Vaccinia Virus - Based Oncolytic Viruses
  - 3.4 Vesicular Stomatitis Virus - based Oncolytic Viruses
  - 3.5 Newcastle Disease Virus - based Oncolytic Viruses
  - 3.6 Various Oncolytic Viruses
- Profiles of Oncolytic Viruses
  - 4.1 HSV-based Oncolytic Viruses
    - 4.1.1 Imlygic; talimogene laherparepvec; T-Vec; OncoVEX(GM-CSF)
    - 4.1.2 G47Δ
    - 4.1.3 HF10; TB-1401
    - 4.1.4 HSV-Rb-p450
    - 4.1.5 HSV1716; seprehvir
    - 4.1.6 BV-2711
    - 4.1.7 ONCR-001.4.2 Adenovirus-based Oncolytic Viruses
      - 4.2.1 Oncorine
      - 4.2.2 CG0070
      - 4.2.3 DNX-2401
      - 4.2.4 OBP-301; telomelysin
      - 4.2.5 ONCOS-102
      - 4.2.6 Enadenotucirev; ColoAd1
      - 4.2.7 Adenoviral VirRx 007; INGN 007; VRX-007
      - 4.2.8 VCN-01
      - 4.2.9 LOAd703
      - 4.2.10 H103
      - 4.2.11 NG-348
      - 4.2.12 ORCA-010
      - 4.2.13 TILT-123
      - 4.2.14 UIO-112
      - 4.2.15 TILT-324
      - 4.2.16 DNX-2440; Delta-24-RGDOX
      - 4.2.17 DNX-2450
      - 4.2.18 OBP-7024.3 Vaccinia Virus-based Oncolytic Viruses
        - 4.3.1 Pexastimogene devacirepvec; Pexa-Vec; JX-594; TG6006
        - 4.3.2 GL-ONC1
        - 4.3.3 JX-929; vvDD
        - 4.3.4 TG6002
        - 4.3.5 WO-124.4 Vesicular Stomatitis Virus-based Oncolytic Viruses
          - 4.4.1 MG1 Maraba/MAGE-A3 (MG1MA3)
          - 4.4.2 VSV-IFNbetta
          - 4.4.3 VSV-IFNbetta-NIS
          - 4.4.4 VSV-GP4.5 Newcastle Disease Virus-based Oncolytic Viruses
            - 4.5.1 NDV-HUJ
            - 4.5.2 PV701
            - 4.5.3 recNDVGM-CSF4.6 Various Oncolytic Viruses
              - 4.6.1 Rigvir
4.6.2 Reolysin; pelareorep
4.6.3 CAVATAK; CVA21
4.6.4 MV-NIS
4.6.5 NTX-010; SVV-001
4.6.6 H-1PV
4.6.7 PVS-RIPO
4.6.8 MYX-135

4.7 Stem Cell-delivered Oncolytic Viruses
4.7.1 TBX.OncV (CRad-Survivan-pk7)

4.7.2 MSC-ICOVIR-55

5 Analysis of Oncolytic Virus Pipeline
5.1 Overview of the Pipeline of Oncolytic Viruses
5.2 Approved and Marketed Oncolytic Viruses
5.3 Late Stage Development of Oncolytic Viruses
5.4 Combination of Oncolytic Viruses with Immune Checkpoint Inhibitors and Other Anti-Tumor Agents
5.5 Armed Oncolytic Viruses

6 Company Profiles
6.1 Pharma & Biotech
6.1.1 Amgen
6.1.2 Astellas Pharma
6.1.3 AstraZeneca
6.1.4 Boehringer Ingelheim
6.1.5 Bristol-Myers Squibb
6.1.6 Celgene
6.1.7 Daiichi Sankyo
6.1.8 Green Cross
6.1.9 Jiangsu Hengrui
6.1.10 Lee Pharma
6.1.11 Medigen Biotechnology
6.1.12 Merck
6.1.13 Otsuka Pharmaceutical Co
6.1.14 Pfizer
6.1.15 Roche

6.2 First Generation Oncolytic Virus Companies
6.2.1 Cold Genesys
6.2.2 Genelix
6.2.3 Latima
6.2.4 Multivir / VirRx
6.2.5 Neotropix
6.2.6 Oncolytics Biotech
6.2.7 Shanghai Sunway Biotech
6.2.8 SillaJen
6.2.9 Takara Bio
6.2.10 Theravir
6.2.11 Virttu Biologics & TNK Therapeutics
6.2.12 Wellstat Biologics

6.3 Second Generation Oncolytic Virus Companies
6.3.1 DNATrix
6.3.2 Oncolyx BioPharma
6.3.3 ORCA Therapeutics
6.3.4 Oryx
6.3.5 Targovax
6.3.6 VCN Biosciences
6.3.7 Viralytics

6.4 Third Generation Oncolytic Virus Companies
6.4.1 Benevir BioPharm
6.4.2 Lokon Pharma
6.4.3 PsiOxus Therapeutics
6.4.4 Transgene

6.5 Fourth Generation Oncolytic Virus Companies
6.5.1 Duke University Start-Up Company
6.5.2 IGNITE Immunotherapy
6.5.3 Oncorus
6.5.4 Replimmune
6.5.5 TILT Biotherapeutics
6.5.6 Turnstone Biologics
6.5.7 Unleash Immuno Oncolytics
6.5.8 ViraTherapeutics
6.5.9 Vyriad
6.5.10 Western Oncolytics

Stakeholder Analysis
7.1 Pharma & Biotech
7.2 First Generation Oncolytic Virus Companies
7.3 Second Generation Oncolytic Virus Companies
7.4 Third Generation Oncolytic Virus Companies
7.5 Fourth Generation Oncolytic Virus Companies

Financing & Partnering
8.1 Grants, Credits & Donations
8.2 Venture Capital, Private Equity & Private Placements
8.3 Partnering Deals
8.4 Listing on the Stock Market
8.5 Mergers & Acquisitions

Trends & Opportunities

References
List Of Tables in The Oncolytic Virus Landscape 2017: an analysis of pipeline, stakeholders, deals, industry trends & opportunities [Report Updated: 01-01-2016]

The Oncolytic Virus Landscape 2017: an analysis of pipeline, stakeholders, deals, industry trends & opportunities

Tables in the Text:

Table 1: Selection, Design & Construction of HSV - based Oncolytic Viruses

Table 2: Selection, Design & Construction of Adenovirus - based Oncolytic Viruses

Table 3: Selection, Design & Construction of Vaccinia Virus - based Oncolytic Viruses

Table 4: Selection, Design & Construction of Vesicular Stomatitis Virus - based Oncolytic Viruses

Table 5: Selection, Design & Construction of Newcastle Disease Virus - based Oncolytic Viruses

Table 6: Selection, Design & Construction of Various Virus - based Oncolytic Viruses

Table 7: Current Company-Sponsored Clinical Trials of T-Vec

Table 8: Clinical Trials of ColoAd1

Table 9: Clinical Trials with JX-594

Table 10: Clinical Trials with GL-ONC1

Table 11: Clinical Trials of CAVATAK (CVA21)

Table 12: Clinical Trials with MV-NIS

Table 13: Overview of Oncolytic Viruses by Development Phase & Virus Family

Table 14: Profile of Approved and Marketed Oncolytic Viruses

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Table 15: Pivotal Study Design of Oncolytic Viruses in Late Stage Development Based on Previous Clinical Results

Table 16: Approved Indications of Immune Checkpoint Inhibitors

Table 17: Active Clinical Studies of Oncolytic Viruses in Combination with Immune Checkpoint Inhibitors (ICI)

Table 18: Planned Clinical Studies of Oncolytic Viruses in Combination with Immune Checkpoint Inhibitors (ICI)

Table 19: Active or Planned Clinical Studies of Oncolytic Viruses in Combination with Other Anti-Cancer Therapeutics

Table 20: Pattern of Transgenes in Oncolytic Viruses in Relation to Development Phase

Tables 21a and 21b: Indications and Frequency and Way of Administration of Oncolytic Viruses in Active and/or Positive Completed Clinical Studies

Table 22: Small and Medium Pharma & Biotech as Partner for Regional Co-Development of Oncolytic Viruses

Table 23: Immuno-Oncology Portfolio of Major Pharma & Biotech with Interest in Oncolytic Viruses

Table 24: Interests of Major Pharma & Biotech in Oncolytic Viruses

Table 25: First Generation Oncology Virus Companies and their Sources of Technology

Table 26: Second Generation Oncology Virus Companies and their Sources of Technology

Table 27: Third Generation Oncology Virus Companies and their Sources of Technology

Table 28: Fourth Generation Oncology Virus Companies and their Sources of Technology

Table 29: Grants, Credits & Donations

Table 30: Financing by Venture Capital, Private Equity and Other Private Placements

Table 31: Collaboration & Licensing Agreements

Table 32: Companies Listed on Stock Exchange & Offerings

Table 33: Mergers & Acquisitions
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The Oncolytic Virus Landscape 2017: an analysis of pipeline, stakeholders, deals, industry trends & opportunities [Report Updated: 01-01-2016]

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