

# Cancer Immunotherapies Pharmaceutical and Healthcare Pipeline Review H2

*Cancer Immunotherapies Therapeutic Pipeline Market Review, H2 2017*

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## Summary

Cancer is a group of diseases characterized by abnormal cell growth. It is a multi-step process, as a single mutation is almost certainly insufficient to

cause a cell to become malignant. A number of cellular processes must be deregulated to allow cells to proliferate uncontrollably while evading apoptosis. Initially, key cell growth, proliferative and pro-apoptotic signaling pathways are deregulated in most cancers. These signaling pathways enable cell survival, continued proliferation, and the avoidance of programmed cell death.

It is now widely believed that many tumors express antigens that can be identified by the adaptive immune system, and that can therefore potentially be used to produce an anti-tumor immune response. The immune system is believed to have the greatest potential in terms of treating cancer, as there is evidence tumors are recognized by the immune system, and this tumor-specific immune response is due to the recognition of tumor antigens. However, in many cancers, disease progression is also accompanied by immune suppression, which hinders an effective anti-tumor response and tumor elimination.

Over the past few decades [cancer immunotherapies](#) have developed into important therapeutic options for some types of cancer. Some of these therapies generally enhance the activity of the body's immune system, while others drive the immune system to target specific cancer cells. The different types of cancer immunotherapies used to treat cancer include monoclonal antibodies (mAbs) directed at specific tumor-associated antigens (TAA); immune checkpoint inhibitors, which target key proteins involved in the immune response, such as programmed cell death-1 (PD-1); cancer vaccines, which can be used to stimulate an immune response in a patient; and non-specific immunotherapies, which are therapies that do not target cancer cells specifically, but stimulate the immune system in a more general way, such as interferon therapy.

Overall, there are 2,037 products in active development in the cancer immunotherapy pipeline. This makes it a notable portion of the entire oncology pipeline, and reflects the strong interest in this class of therapy in product development. This is due to growing clinical rationale behind developing such therapies, and the willingness of drug developers to invest in novel therapeutics, which will offer significant product differentiation from market competitors.

The leading indications in terms of cancer immunotherapy product development are breast cancer, melanoma, non-small-cell lung cancer (NSCLC) and ovarian cancer, which are the focus of this



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report. This is based on the high level of activity in terms of cancer immunotherapy product development in these specific oncology indications, with the aforementioned indications ranking highest in this regard.

## Scope

The cancer immunotherapies market already consists of some commercially successful products.

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

The cancer immunotherapies pipeline is vast, with a significant degree of diversity in terms of molecule types and targets.

- Which molecular targets appear most frequently in the pipeline?
- What are the commercial prospects for the most promising late-stage pipeline products?

The cancer immunotherapies market is forecast to rise from a value of \$16.9 billion in 2015 to \$75.8 billion in 2022, at a compound annual growth rate of 23.9%.

- Which products are forecast to drive this substantial degree of growth?
- Will generic competition have a significant impact on the market over the forecast period?

The company landscape is growing increasingly competitive.

- What are the leading companies in terms of market share?
- Which companies are forecast to experience the greatest growth in market share?
- What are the drivers of growth for key companies in the market?
- How dependent are the key companies on this disease cluster for revenue?
- Which companies rely heavily on this disease cluster for revenue?

## Reasons to buy

This report will allow you to -

- Understand the current clinical and commercial landscape through a comprehensive study of disease epidemiology, pathogenesis, symptoms, diagnosis and prognosis for the key indications covered in the report, which includes breast cancer, melanoma, NSCLC and ovarian cancer.
- Assess the current treatment landscape, with product profiles covering prominent marketed therapies, including revenue forecasts.
- Analyze the cancer immunotherapies pipeline and stratify by stage of development, molecule type, and molecular target. The most promising late-stage therapies are profiled and assessed in terms of clinical performance and competitiveness, alongside a single-product forecast.
- Predict growth in market size, with in-depth market forecasting from 2015 to 2022. The forecasts will provide an understanding of how epidemiology trends, new drug entries, and patent expirations will influence market value.
- Identify the leading companies in the market, in terms of market share and growth. Company analysis determines how dependent the key companies in the market are on revenue derived from cancer immunotherapy products. In addition, analysis determines the primary factors that will drive market growth for the key companies in the market.
- Identify commercial opportunities in the cancer immunotherapies deals landscape by analyzing trends in licensing and co-development deals.

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