

# Pipeline Insight: Colorectal Cancer - Growing trend towards personalized medicine

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## Abstracts

### Introduction

CRC incidence will be over 490,000 cases by 2018 in the seven major markets. This large patient base will translate into a high commercial potential for the development of novel, more effective therapies. Currently, there are 77 agents in development for CRC, 4 of which are in late-phase development. Collectively, they are forecast to achieve sales of \$1,398m by 2018.

### Scope

\*Examination of the CRC pipeline with in-depth clinical and commercial profiles of Phase III candidates

\*Seven major pharmaceutical market sales forecasts for Phase III pipeline products through to 2018

\*Segmentation and analysis of the current CRC pipeline by developmental phase, drug class and company

\*Insight and analysis of market potential including commercial opportunity, epidemiology and discussion of unmet needs

### Highlights

The CRC pipeline consists of 77 drugs, of which 60% are molecular targeted therapies (MTTs), 22% are immunotherapies, and 17% are cytotoxic therapies. MTTs constitute

the bulk of the CRC pipeline. This is in line with R&D in other tumor types, where there is a shift away from standard cytotoxic therapies towards MTTs and personalized medicine.

The late-phase CRC pipeline consists only of MTTs. Except for one agent; all the others are being investigated in previously-treated patients. Drug developers appear to be pursuing approval for treatment in the second-line setting where barriers to market entry are lower and the high level of unmet need may facilitate a drug's uptake and approval.

Aflibercept (VEGF-Trap; Regeneron/Sanofi-Aventis) is forecast to achieve the highest level of sales among the late-phase pipeline candidates in the CRC market, generating £604m by 2018 in the seven major pharmaceutical markets.

### **Reasons to Purchase**

\*Identify key drugs and companies within the CRC pipeline based on sales forecasts to 2018 and Datamonitor drug assessment.

\*Characterize unmet need and poorly served patient subsets within the CRC market and assess the potential for pipeline products to fulfil them.

\*Segmentation and analysis of the current CRC pipeline by developmental phase, drug class, company and indication.

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