

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

<https://marketpublishers.com/r/PFF0443E33AEN.html>

Date: October 2009

Pages: 51

Price: US\$ 11,400.00 (Single User License)

ID: PFF0443E33AEN

## **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.

## Contents

### OVERVIEW

Catalyst  
Summary

### LIST OF FIGURES

Figure 1: Datamonitor drug assessment summary for molecular targeted therapies (MTTs) in development for colorectal cancer (CRC), 2009

Figure 2: Colorectal cancer (CRC) pipeline split by development phase and drug class, 2009

Figure 3: Datamonitor drug assessment summary for molecular targeted therapies (MTTs) in development for colorectal cancer (CRC), 2009

Figure 4: Incidence and mortality from colorectal cancer (CRC) in the seven major pharmaceutical markets, 2009 and 2018

Figure 5: Incidence of colorectal cancer (CRC) in the rest of the world, 2009 and 2019

Figure 6: Datamonitor drug assessment summary for molecular targeted therapies in development for colorectal cancer (CRC), 2009

Table 13: Forecast assumptions for molecular targeted therapy colorectal cancer (CRC) pipeline products across the seven major markets, 2009

Table 14: Forecast assumptions for molecular targeted therapy colorectal cancer (CRC) pipeline products across the seven major markets, 2009

Figure 7: SWOT analysis for aflibercept, 2009

Figure 8: Phase II data on the second-line treatment of aflibercept in recurrent metastatic colorectal cancer (CRC) patients following failure of standard therapy

Figure 9: Datamonitor drug assessment summary for aflibercept in colorectal cancer (CRC), 2009

Figure 10: Brivanib SWOT analysis, 2009

Figure 11: Retrospective analysis evaluating correlation between KRAS status and efficacy from a Phase I/II study of brivanib in combination with Erbitux in patients with advanced or metastatic colorectal cancer (CRC)

Figure 12: Datamonitor drug assessment summary for brivanib in colorectal cancer (CRC), 2009

Figure 13: SWOT analysis for Recentin, 2009

Figure 14: Phase II results for second-line FOLFOX + Recentin versus FOLFOX + Avastin in metastatic colorectal cancer (CRC) (HORIZON I)

Figure 15: Datamonitor drug assessment summary for Recentin in colorectal cancer

(CRC), 2009

Figure 16: SWOT analysis for MK-0646, 2009

Figure 17: Phase II study of MK-0646 in second-line or higher metastatic colorectal cancer (CRC) patients with wild-type KRAS

Figure 18: Datamonitor drug assessment summary for MK-0646 in colorectal cancer (CRC), 2009

Figure 19: Early-stage colorectal cancer pipeline (CRC) split by drug class, 2009

Figure 20: Datamonitor drug assessment summary for molecular targeted therapies in development for colorectal cancer (CRC), 2009

## About

### ABOUT DATAMONITOR HEALTHCARE

About the Oncology pharmaceutical analysis team

Executive Summary

Strategic scoping and focus

Datamonitor insight into the colorectal cancer market

Datamonitor pipeline assessment summary

Related reports

Upcoming related reports

Table of Contents

### 1. PIPELINE OVERVIEW AND DYNAMICS

Key findings

Pipeline overview

Pipeline summary

Novel molecular targeted therapies dominate the current late-phase colorectal cancer pipeline

Comparative forecasts

Datamonitor pipeline assessment summary

Key companies involved in the colorectal cancer (CRC) pipeline

Amgen

AstraZeneca

Roche

Key R&D company strategies

Ongoing shift towards molecular targeted therapies in colorectal cancer

Line extensions of already marketed drugs

### 2. COLORECTAL CANCER - MARKET POTENTIAL

Key findings

Definition

Introduction

Colorectal cancer is one of the 'big four' tumors and numbers are set to rise over the next decade

Histology

Risk factors

CRC is predominantly a disease of the elderly  
People with CRC in the family have a high risk of developing the disease  
Western style diets contribute to CRC incidence  
Rise of CRC in the migrant population  
Symptoms  
Screening and diagnosis  
Fecal occult blood test is the most commonly used screening method  
Endoscopic methods are not ideal for CRC screening  
CRC screening remains fragmented between countries  
Patient segmentation  
Proper staging is essential to the design of treatment plans  
Epidemiology  
Seven major markets  
CRC cases are expected to rise in line with the aging world population  
Low detection in the early stages of the disease results in a high mortality rate  
Rest of the world  
Current treatment options  
Surgery remains the primary treatment choice for early-stage CRC  
Adjuvant therapy extends disease-free survival in Stage III patients  
Combination chemotherapy is the standard of care in metastatic disease  
Avastin is used predominantly in the US in the first-line setting  
Erbix is indicated for use in patients with wild-type KRAS status  
Vectibix has limited uptake in the treatment of the disease  
Current comparator therapy  
Eloxatin (oxaliplatin; Sanofi-aventis)  
Unmet need in colorectal cancer (CRC)  
Better screening approaches needed to decrease mortality rates  
There is a need for more effective therapies in both early-stage and advanced disease  
Biomarkers and the selection of patients may help improve outcomes  
Target product profile versus current level of attainment

### **3. R&D APPROACH**

Key findings  
Clinical trial design in colorectal cancer (CRC)  
Patient selection  
Clinical trial endpoints in oncology  
Overall survival  
Disease-free survival

Overall response rates  
Progression-free survival  
Disease control  
Toxicity

#### **4. PIPELINE ANALYSIS & FORECASTS: MOLECULAR TARGETED THERAPIES**

Key findings  
Overview of the molecular targeted therapies  
Pipeline summary  
Comparative forecasts  
Aflibercept (VEGF-Trap; Regeneron/Sanofi-aventis)  
Drug overview  
Drug profile  
Key historical events  
SWOT analysis  
Clinical trial data  
Phase II studies show aflibercept to be well tolerated in metastatic CRC  
Clinical attractiveness  
Commercial attractiveness  
Datamonitor drug assessment summary  
Satisfaction of unmet needs  
Forecasts to 2018  
Brivanib (Bristol-Myers Squibb)  
Drug overview  
Drug profile  
Key historical events  
SWOT analysis  
Clinical trial data  
The combination of brivanib with Erbitux is tolerable and shows signs of clinical activity  
Retrospective study shows that efficacy of brivanib with Erbitux is driven by wild-type KRAS patients  
Clinical attractiveness  
Commercial attractiveness  
Datamonitor drug assessment summary  
Satisfaction of unmet needs  
Forecasts to 2018  
Recentin (cediranib; AstraZeneca)  
Drug overview

Drug profile  
Key historical events  
SWOT analysis  
Clinical trial data  
Recentin shows disappointing results in a Phase II head-to-head trial against Avastin  
Clinical attractiveness  
Commercial attractiveness  
Datamonitor drug assessment summary  
Satisfaction of unmet needs  
Forecasts to 2018  
MK-0646 (Merck/Pierre Fabre)  
Drug overview  
Drug profile  
Key historical events  
SWOT analysis  
Clinical trial data  
Phase II shows MK-0646 to be tolerable in metastatic patients with wild-type KRAS  
Clinical attractiveness  
Commercial attractiveness  
Datamonitor drug assessment summary  
Satisfaction of unmet needs  
Forecasts to 2018

## **5. INNOVATIVE EARLY-STAGE APPROACHES**

Key findings  
Overview of early-stage innovative projects

### **TRAIL**

Insulin-like growth factor receptor (IGFR)  
MAP kinase pathway  
The future of treatment of colorectal cancer (CRC)  
Molecular markers will become an important part of therapy for patient selection  
The future will see more combination therapies to target multiple pathways  
Increased understanding of cancer evolution should result in a large range of potential drug targets  
Bibliography  
Journals



Websites

Datamonitor reports

## **APPENDIX**

Methodology

Epidemiology forecasts

Product forecasts

Datamonitor drug assessment scorecard

Contributing experts

About Datamonitor

About Datamonitor Healthcare

About the Oncology analysis team

Datamonitor consulting

Disclaimer

## List Of Tables

### LIST OF TABLES

Table 1: Sales forecasts for late-phase colorectal cancer (CRC) pipeline products in the seven major markets (\$m), 2009-2018

Table 2: Drugs in late-phase development for colorectal cancer (CRC), 2009

Table 3: Sales forecasts for late-stage colorectal cancer (CRC) pipeline products in the seven major markets (\$m), 2009-2018

Table 4: Amgen's marketed and pipeline oncology portfolio, 2009

Table 5: AstraZeneca's marketed and pipeline oncology portfolio, 2009

Table 6: Roche's marketed and pipeline oncology portfolio, 2009

Table 7: Forecast incidence of colorectal cancer (CRC) in the seven major pharmaceutical markets, 2009-2018

Table 8: Molecular targeted therapies (MTTs) approved for use in metastatic colorectal cancer (CRC), 2009

Table 9: Eloxatin (oxaliplatin) - drug profile, 2009

Table 10: Ability of Eloxatin to meet unmet needs in the first-line treatment of metastatic colorectal cancer (CRC), 2009

Table 11: Ability of Eloxatin to meet unmet needs in the second-line treatment of metastatic colorectal cancer (CRC), 2009

Table 12: Drugs in late-phase development for colorectal cancer (CRC) , 2009

Table 15: Sales forecasts for late-phase colorectal cancer (CRC) pipeline products in the seven major markets (\$m), 2009-2018

Table 16: Aflibercept - drug profile, 2009

Table 17: Aflibercept: key historical events

Table 18: Clinical development of aflibercept in colorectal cancer (CRC), 2009

Table 19: Ability of aflibercept to meet unmet needs in colorectal cancer (CRC), 2009

Table 20: Sales forecast for aflibercept in colorectal cancer (CRC) across the seven major markets (\$m), 2009-2018

Table 21: Brivanib - drug profile, 2009

Table 22: Brivanib: key historical events

Table 23: Clinical development of brivanib in colorectal cancer (CRC), 2009

Table 24: Phase I results investigating a second-line or higher combination of Erbitux and brivanib in advanced gastrointestinal malignancies

Table 25: Ability of brivanib to meet unmet needs in colorectal cancer (CRC), 2009

Table 26: Sales forecast for brivanib in colorectal cancer (CRC) across the seven major markets(\$m), 2009-2018

Table 27: Recentin (cediranib) - drug profile, 2009

Table 28: Recentin: key historical events

Table 29: Clinical development of Recentin in colorectal cancer (CRC), 2009

Table 30: Ability of Recentin to meet unmet needs in colorectal cancer (CRC), 2009

Table 31: Sales forecast for Recentin in colorectal cancer (CRC) across the seven major markets (\$m), 2009-2018

Table 32: MK-0646 - drug profile, 2009

Table 33: MK-0646: key historical events

Table 34: Clinical development of MK-0646 in colorectal cancer (CRC), 2009

Table 35: Ability of MK-0646 to meet unmet needs in colorectal cancer (CRC), 2009

Table 36: Sales forecast for MK-0646 in colorectal cancer (CRC) across the seven major markets, 2009-2018 (\$m)

Table 37: Top 10 early-stage colorectal cancer (CRC) drug targets, 2009

Table 38: Datamonitor drug assessment parameters

## I would like to order

Product name: Pipeline Insight: Colorectal Cancer - Growing trend towards personalized medicine

Product link: <https://marketpublishers.com/r/PFF0443E33AEN.html>

Price: US\$ 11,400.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/PFF0443E33AEN.html>