

# **Global Cancer Immunotherapy Market Analysis & Forecast to 2025: Antibody Drug Conjugates (ADCs), Bispecific Monoclonal Antibodies, Cancer Vaccines, Cytokines, Interferons, Chimeric Antigen Receptor (CAR) T-Cell Therapy, PD-1/PD-L1 inhibitors, Dendritic Cells, Checkpoint Inhibitors, Adopted Cell Therapy (ACT) & IDO Inhibitors**

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## **Abstracts**

Within the cancer therapeutics space, which today is worth over \$160 billion globally, immunotherapeutic drugs have gained worldwide acceptance. This is because they are targeted therapeutics that have high specificity for cancer cells. Today, cancer immunotherapy drugs have captured nearly 50% of the overall oncology drugs market, generating about \$75 billion in 2019 alone and are forecast to surpass \$143 billion in 2025. This report describes the evolution of such a huge market in 20 chapters supported by over 180 tables and figures in 450 pages.

An overview of cancer immunotherapy that includes: monoclonal antibodies, ADC's, cancer vaccines and non-specific cancer immunotherapies and CAR T therapies.

Focus on current trends in cancer immunotherapies that include: anti-PD-1 and anti-PDL1 drugs, Dendritic cell vaccines, T-cell therapies and cancer vaccines.

Insight into the challenges faced by drug developers, particularly about the success vs. failure ratios in developing cancer immunotherapy drugs.

Descriptions of more than 23 cancer immunotherapeutics approved and used as

targeted drugs

Insight into the various immunotherapeutics available for specific cancer types.

Description and data for the prevalence of cancer types that are addressed by cancer immunotherapeutics.

Overall global cancer therapeutics market, leading market players and the best selling cancer drugs.

Detailed account of the market for cancer immunotherapeutics by geography, indication, company and individual drugs.

Profiles, marketed products and products in the pipeline of 79 companies that are located globally

Summary table to identify the category of immunotherapy drug offered by the 79 companies.

Specific chapter on the CAR-T industry detailing manufacturing, regulations and pricing

## **EXECUTIVE SUMMARY**

Immunotherapy is forecast to become the oncology treatment of choice by 2026 with an estimated 60% of previously treated cancer patients likely to adopt immunotherapy in this timeframe. Multiple treatment lines, combination therapy and the opportunity for repeat treatment are likely to accelerate fast growth. Cancer immunotherapy also expands into multiple indications and our analysis indicates that key immunotherapies including anti-PD-1 drugs, dendritic cell vaccines, Tcell therapies and cancer vaccines are all driving the market. The rising incidence and prevalence of numerous cancers globally is a significant accelerator of growth. This is due to more sensitive early detection techniques, higher patient awareness and a growing aging population. Furthermore, the FDA's pro-science attitude will accelerate development and regulatory approval for these drugs.

To that end, the cancer immunotherapy market is forecast to hit \$143 billion by 2025. Overall strong growth rates are expected due to a significant unmet need and

increasing trends of hematological cancers.

Prior to the launching of Yervoy, the five-year survival rate for patients with early stage melanoma was 98%; but the five-year survival rate for late-stage melanoma was just 16%. Yervoy has been reported to have a survival rate of 25% when tested alone. When tested as part of a combination therapy treatment with Bristol's nivolumab, the two-year survival rates rose to 88% for patients with late-stage cancer. Increase in patient survival rates brought about by cancer immunotherapy treatment is similar to that seen when bone marrow transplantation changed our conception on how blood cancer was treated. Other key therapeutic players in this market include Opdivo (nivolumab), Keytruda (pembrolizumab), Tecentriq (atezolizumab), Ibrance (palbociclib) the newly approved Bavencio (avelumab) and Imfinzi (durvalumab) and of course the first CAR-T therapies Kymriah (tisagenlecleucel) and Yescarta (axicabtagene ciloleucel).

Opdivo (nivolumab) from BMS is one of the most exciting agents in the immunotherapy space, and is indicated for melanoma, lung cancer, kidney cancer, blood cancer, head and neck cancer, and bladder cancer. It was given a fast-track approval on December 22, 2014. The majority of immuneoncology agents are anti-programmed death-1 (PD-1) monoclonal antibodies, which will certainly guide the market over the coming years. Projects that currently are valuable include combined immunotherapies on our knowledge of CD137 and PD-1/PDL1 mechanisms. A study on a novel effector activating monoclonal antibody known as IMAB362 for the treatment of solid cancers is also exciting. Other projects comparing CAR-T cell effectiveness against T-cells that target CD19 or mesothelin are interesting in a preclinical setting. Of course, Novartis gained the first CAR-T FDA approval for Kymriah (tisagenlecleucel, CTL019) for children and young adults with B-cell ALL. FDA approved Yescarta (axicabtagene ciloleucel) from Kite Pharma for adult patients large B-cell lymphoma is a major boost for the global and US immunotherapy, and gene therapy markets.

## **WHAT ARE CAR-T THERAPIES? HOW WILL THEY IMPACT THE MARKET?**

CAR T (chimeric antigen receptor T) cells are engineered specificity using antibody fragments directed to the tumor cell, and also T-cell CD8/CD3 plasma membrane proteins that elicit specific activity towards the tumor cell, via intracellular signaling pathways. To date publications have revealed a number of effective intracellular molecules in the engineered T cell including CD28, 4-1BB (CD137) and CD3 zeta. These engineered T cells have numerous advantages including:

Intracellular domain can be modified to increase efficacy and durability of CAR-T

CAR-T are still subject to the same regulatory and tolerogenic constraints of natural T cells, including checkpoints, Treg, MDSC

CAR-T can be engineered to express cytokines and chemokines that further enhance function and migration

Can be modified to express suicide genes that limit CAR-T population if toxicity occurs

To date, the main challenges associated with CAR T therapy include manufacturing, regulations, pricing and toxicity in patients. Currently there are over 100 recruiting CAR-T clinical trials globally, mainly in the US, China and Europe. To date a number of CAR T Cells (autologous/allogeneic) trials are demonstrating clinical benefit to patients, but others have demonstrated toxicity such as cytokine release syndrome. In July 2017, an FDA advisory panel determined that the benefits of CAR T outperform the risks. Kymriah (tisagenlecleucel) by Novartis is indicated to treat children and young adults with acute leukemia and performed well in the ELIANA trial. The FDA's Oncologic Drugs Advisory Committee (ODAC) recommended this agent for approval and became the first CART cell therapy on the US market. In October 2017, Yescarta (axicabtagene ciloleucel) from Kite Pharma for adult patients large B-cell lymphoma was also given FDA approval.

The CAR-T industry is addressing unmet needs in specific relapsed cancers, and trials have indicated that some patients show long term activity and high remission rates, but there is a large proportion of patients with toxicities such as cytokine release syndrome and neurotoxicity. The main players within the CAR-T market are Novartis, Juno Therapeutics, Kite Pharma and Cellectis. The market is moving ahead, backed by years of R&D, from both academia and industry, investors capitol and small clinical studies. From now on Kelly Scientific forecasts that CAR T therapy will become more streamlined, with faster manufacturing times as advances in technologies take hold and clinical trials provide more robust evidence that this immunotherapy is robust. These factors, plus strategies to reduce adverse reactions and toxicities and larger players like Novartis taking stage will push CAR-T therapy ahead. However, recent deaths in the Juno ROCKET trial are creating questions amongst investors. How will the CAR T space influence the total immunotherapy industry going forward? This comprehensive report scrutinizes the total market and provides cutting-edge insights and analysis.

## KEY QUESTIONS ANSWERED IN THIS REPORT

What is the global market for cancer immunotherapeutics by product class such as MAbs, vaccines and non-specific immunotherapies, through 2025?

What is the global market for cancer immunotherapeutics by geography, through 2025?

What is the global market for cancer immunotherapeutics by indication, through 2025?

What is the global market for MAbs by type such as naked MAbs and ADCs, through 2025?

What are the market values for Herceptin, Avastin, Erbitux, Yervoy, Mabthera, Adectris, and Keytruda?

What is the global market for cancer vaccines?

What is the global market for cytokines in cancer immunotherapy?

The projected market values for Nivolumab, Tecentriq, DCVax-L, Imfinzi?

What immunotherapies have been approved to date?

What monoclonal antibodies (MAbs) were approved by the FDA to treat different types of cancers?

What are naked MAbs and how many of them have been approved by the FDA?

What are antibody-drug conjugates (ADCs) and how many of them are available in the market?

What are the common cytotoxic “wareheads” used in ADCs?

What are the important clinical assets in ADCs?

How many bispecific MAbs are in late-stage development?

What are the common side effects of MAbs in cancer immunotherapy?

What are cancer vaccines and how many of them have been licensed to be marketed?

How many cytokines have been approved for being used in cancer immunotherapy?

What are the major checkpoint inhibitors in clinical development?

What is the current status of anti-PD-1 drugs, dendritic cell therapies, T-cell therapies and cancer vaccines?

What are the most valuable R&D projects in cancer immunotherapy and what would be their approximate sales revenues in 2025?

Number of melanoma drugs approved to date?

Number of lung cancer drugs approved to date?

Number of brain cancer drugs approved to date?

What is CAR T Therapy?

What are the main challenges associated with CAR T therapy?

What is the status of CAR T therapeutic approval?

What are the current regulations for immunotherapies in USA, Europe & Japan?

What are the main manufacturing steps in CAR T therapy?

What challenges lie ahead for CAR T production?

## **DATA SOURCES AND METHODOLOGY**

Based in Locations in Europe and Asia, our analyst team are all PhD-level experts and

*Global Cancer Immunotherapy Market Analysis & Forecast to 2025: Antibody Drug Conjugates (ADCs), Bispecific Mo...*

industryexperienced professionals. They pool resources, contacts, business acumen and technical experience to provide cutting edge insights for all of Kelly Scientific reports. Our senior analysts have at least ten years' experience in major strategic corporations. Our methodologies are clearly defined from the outset. Initially a number of clear objectives are set, e.g., to identify the market size, segmentation, key players, SWOT analysis, influential technologies, and business and economic environments:

By Company (e.g., Merck, Novartis, BMS, Juno, Kite, Cellectis)

By Geography (US, UK, EU)

By Segment (Cancer type, Product Class, Vaccine, Monoclonal Antibody, CAR T therapy)

Key Strengths, Weaknesses and Threats Influencing Leading Player Position within the Market:

Technologies Driving the Market

Top Fastest Growing Market Segments and Emerging Opportunities

Top Pharmaceutical Companies within the by Market Share and Revenue

Comprehensive Product Portfolios, R&D Activity and Pipeline Therapeutics

M&A Activity and Future Strategies of Top Pharmacos

Following this, we determine key financial data & business strategy information to give clients the most accurate information required to identify areas of profitable growth and what technical advantages are required in a competitive landscape:

Company Financials, Sales & Revenue Figures

Business Model Strategies for Diagnostic, Pharmaceutical and Biotechnology

Companies

Market analysis is initiated using primary research tools such as speaking directly with endusers, identifying their needs and any un-met needs in the market place. This exploratory research identifies any specific requirements in the market, and is tailored specifically to niche markets such as immunotherapy, personalized medicine, targeted therapeutics and companion diagnostics, drug delivery systems, cosmetic surgery and services, and cancer biomarkers. At Kelly Scientific, we have a wide range of contacts within these niche areas that provide us with cutting edge insights to a marketplace that is beyond the reach of many.

We also travel to a wide range of international conferences quarterly to source new data and trends from global experts.

Secondary research performed by Kellyscipub.com is meticulously scrutinized and analysed prior to integration into a final report. We only use validated and confirmed sources of information from company specific corporate websites, annual reports, press-releases, international scientific and medical journals and research reports. All graphical and numerical data included in our reports are referenced and sourced accordingly. Specific websites are consulted and referenced throughout the including that of the Food and Drug Association ([www.fda.gov](http://www.fda.gov)), the National Cancer Institute, World Health Organization, PubMed, Clinicaltrials.gov and other government agencies worldwide. Kelly Scientific utilises the most recent statistical and numerical data available.

Together both primary and secondary research and also unique insights from the chief analysts and editor alike provide the client with a report that exceeds its competitors. We strive to out-perform our competitors, just like our clients.

The project leader and author of this report is a retired college professor with 32 years of experience in teaching biochemistry, biotechnology, pharmacology, cell biology and molecular biology. He also has written 35 healthcare-related market research reports covering medical devices, pharmaceuticals and biotechnologies. Data for this report were collected and compiled from company websites, annual reports, press releases, international scientific journals and FDA documents. Data on the incidence of different types of cancers were collected from authentic sources and they have been appropriately indicated. Kelly Scientific has used the latest available data from reliable sources only; however we cannot guarantee complete accuracy or completeness from secondary information sources.

The senior editor of this research obtained a Ph.D. in Medicine/Genetics/Immunology

from the Royal College of Surgeons in Ireland, following completion of a M.Sc. in Biotechnology (NUIG) and an honours degree in Biochemistry from Trinity College Dublin. With many years of medical writing and publishing the senior editor also has extensive experience and knowledge of molecular biology, immunology, bioinformatics and diagnostic testing. As a pharma/biotech industry analyst she has significant expertise in laboratory diagnostic testing and instrument and reagent development technology

## Contents

### 1.0 EXECUTIVE SUMMARY

- 1.1 Objectives of Report
- 1.2 Key Questions Answered in this Report
- 1.3 Data Sources and Methodology

### 2.0 CANCER IMMUNOTHERAPY: AN OVERVIEW

- 2.1 Human Immune System
  - 2.1.1 Components of Human Immune System
- 2.2 Types of Cancer Immunotherapy
- 2.3 Monoclonal Antibodies (Mabs) to Treat Cancer
  - 2.3.1 Most Frequently Targeted Antigens by MAbs
- 2.4 Types of Monoclonal Antibodies (MAbs)
  - 2.4.1 Naked MABs
  - 2.4.2 Conjugated Monoclonal Antibodies
    - 2.4.2.1 Components of an Antibody Drug Conjugate (ADC)
    - 2.4.2.2 Mechanism of Action of Antibody Drug Conjugate (ADC)
    - 2.4.2.3 The Cytotoxic Wareheads used in ADCs
    - 2.4.2.4 Successful Cytotoxin Wareheads
    - 2.4.2.5 Developmental Timeline of ADCs
    - 2.4.2.6 Target Antigens for ADCs in Preclinical and Clinical Development
    - 2.4.2.7 Important Clinical Assets in ADCs
  - 2.4.3 Bispecific Monoclonal Antibodies
    - 2.4.3.1 Technology Platforms for the Production of Bispecific MABs
  - 2.4.4 Safety and Side Effects of MABs in Cancer Immunotherapy
- 2.5 Cancer Vaccines
  - 2.5.1 Cancer Vaccines in Development
- 2.6 Non-Specific Cancer Immunotherapies and Adjuvants
  - 2.6.1 Cytokines
  - 2.6.2 Interferon (IFN)
- 2.7 New Frontiers in Cancer Immunotherapy Research
  - 2.7.1 Drugs for Targeting Immune Checkpoints
    - 2.7.1.1 Cytotoxic T-Lymphocyte-Associated Protein-4 (CTLA-4)
    - 2.7.1.2 Programmed Death 1 (PD-1) and Programmed Death Ligand 1 (PD-L1)
    - 2.7.1.3 Major Checkpoint Inhibitors in Clinical Development
  - 2.7.2 Chimeric Antigen Receptor (CAR) T Cell Therapy

- 2.7.3 Tumor-Infiltrating Lymphocytes (TILs) and Interleukin-2 (IL-2)
- 2.8 Cancer Immunotherapy: Timeline of Progress

### **3.0 CURRENT STATUS OF CANCER IMMUNOTHERAPY: AN OVERVIEW**

#### **3.1 Programmed Death (PD-1) Inhibitors**

- 3.1.1 Important Events and Advantages for Nivolumab in Melanoma Indication
- 3.1.2 Important Events and Advantages for Nivolumab in Non-Small Cell Lung Cancer
- 3.1.3 Important Events and Advantages for Nivolumab in Renal Cell Cancer
- 3.1.4 Nivolumab Studies for Melanoma
- 3.1.5 Nivolumab Studies for Non-Small Cell Lung Cancer (NSCLC)
- 3.1.6 Nivolumab Studies for Renal Cell Cancer (RCC)

#### **3.2 Keytruda (Pembrolizumab, MK-3475)**

- 3.2.1 Important Events and Advantages for Keytruda in Melanoma
- 3.2.2 Important Events and Advantages for Keytruda in NSCLC
- 3.2.3 Important Events for Keytruda in RCC

#### **3.3 Tecentriq from Roche**

- 3.3.1 Important Events for Tecentriq in Melanoma
- 3.3.2 Important Events and Advantages for Tecentriq in NSCLC
- 3.3.3 Important Event for Tecentriq in RCC
- 3.3.4 Tecentriq Studies in NSCLC
- 3.3.5 Tecentriq Studies in RCC
- 3.3.6 Tecentriq Study in RCC

#### **3.4 Pidilizumab from CureTech**

#### **3.5 An Overview of Anti-PD-1 Clinical Development**

- 3.5.1 Other Checkpoint Inhibitors in Development

#### **3.6 Studies with Yervoy (Ipilimumab)**

#### **3.7 Studies with Tremelimumab**

#### **3.8 KHR-102**

#### **3.9 TIM3 Antibody**

#### **3.10 BMS-989016**

#### **3.11 ImmuTune IMP701 and ImmuFact IMP321**

#### **3.12 Dendritic Cell Therapies**

- 3.12.1 Provenge (Sipuleucel-T)
- 3.12.2 AGS-003 from Argos Therapeutics
- 3.12.3 DCP-001 from DCPrime
- 3.12.4 DC-Vax from Northwest Biotherapeutics

#### **3.13 Chimeric Antigen Receptor T-Cells (CAR-T) Therapies**

- 3.13.1 CLT109

- 3.13.2 Chimeric Antigen Receptors (CAR) Program by Juno
- 3.13.3 Chimeric Antigen Receptor (CAR) T-Cell Program by Bluebird Bio
- 3.13.4 UCART19 from Cellectis
- 3.13.5 Chimeric Immune Receptor (CIR) T-Cells from Abramson Cancer Center
- 3.13.6 CD19 eACT CAR-T Therapy from Kite Pharma
- 3.13.7 Autologous CAR-T Program for Breast Cancer from Adaptimmune
- 3.14 Cancer Vaccines
  - 3.14.1 HyperAcute
  - 3.14.2 MAGE-A3 Antigen-Specific Cancer Immunotherapeutic
  - 3.14.3 ADXS-HPV
  - 3.14.4 IDO Inhibitors
  - 3.14.5 Indoximod and NLG-919 (INCY)
  - 3.14.6 INCB24360 (INCY)
  - 3.14.7 deCellVax (BMSN)
- 3.15 Miscellaneous Immunotherapies
  - 3.15.1 Contego (Lion Biotechnologies)
  - 3.15.2 TG4010 (Transgene)
- 3.16 Most Valuable R&D Projects in Cancer Immunotherapy
  - 3.16.1 Nivolumab (Opdivo)
  - 3.16.2 Keytruda
  - 3.16.3 Tecentriq
  - 3.16.4 Palbociclib
  - 3.16.5 DCVax-L
  - 3.16.6 Imfinzi

## **4.0 CHALLENGES IN CANCER MEDICINE RESEARCH: AN OVERVIEW**

- 4.1 Years of Failures and Emerging Successes in Melanoma Medicine Research
  - 4.1.1 Future Outlook for Melanoma Drugs
- 4.2 A New Era for Lung Cancer Medicines
  - 4.2.1 Progresses Made in Lung Cancer Medicine Research
  - 4.2.2 Successes and Failures in Lung Cancer Medicine Development
  - 4.2.3 Future Outlook for Lung Cancer Medicines
- 4.3 Ray of Hope for Brain Cancer Patients
  - 4.3.1 Progress made for Brain Cancer Treatment in Recent Years
  - 4.3.2 Successes and Failures in Brain Cancer Drug Development

## **5.0 CANCER IMMUNOTHERAPEUTIC PRODUCTS: AN OVERVIEW**

- 5.1 I-Labelled Tositumomab (Bexxar)
- 5.2 Y-Labelled Ibritumomab (Zevalin)
- 5.3 Alemtuzumab (Campath)
- 5.4 Adotrastuzumab Emtansine (Kadcyla)
- 5.5 Bacillus Calmette-Guerin (BCG)
- 5.6 Bevacizumab (Avastin)
- 5.7 Brentuximab Vedotin (Adcetris)
- 5.8 Cetuximab (Erbix)
- 5.9 Cervarix
- 5.10 Denileukin Diftitox (Ontak)
- 5.11 Gardasil
- 5.12 Gemtuzumab (Mylotarg)
- 5.13 Hepatitis B Vaccine
- 5.14 Interferon Alfa (IFN-alfa)
- 5.15 Interleukin-2 (IL-2)
- 5.16 Ipilimumab (Yervoy)
- 5.17 Ofatumumab (Arzerra)
- 5.18 Panitumumab (Vectibix)
- 5.19 Pembrolizumab (Keytruda)
- 5.20 Rituximab (Mabthera)
- 5.21 Sargramostim (Leukine)
- 5.22 Sipuleucel-T (Provenge)
- 5.23 Trastuzumab (Herceptin)

## **6.0 AVAILABLE IMMUNOTHERAPIES FOR CANCER BY DISEASE TYPE: AN OVERVIEW**

- 6.1 Melanoma Skin Cancer and Immunotherapy
  - 6.1.1 Ipilimumab (Yervoy) for Advanced Melanoma
  - 6.1.2 PD-1 Inhibitors (Keytruda and Opdivo) for Advanced Melanoma
  - 6.1.3 Cytokines for Advanced Melanoma
  - 6.1.4 Interferon Alfa as Adjuvant Therapy for Melanoma
  - 6.1.5 Bacille Calmette-Guerin (BCG) Vaccine for Melanoma
  - 6.1.6 Imiquimod (Zyclara) Cream for Melanoma
- 6.2 Breast Cancer and Immunotherapy
  - 6.2.1 Promising Therapeutic Vaccine Product Candidates for Breast Cancer
  - 6.2.2 Promising Checkpoint Inhibiting Product Candidates for Breast Cancer
  - 6.2.3 Promising Adoptive T Cell Therapy Product Candidates for Breast Cancer
  - 6.2.4 Promising Antibody Product Candidates for Breast Cancer

## 6.3 Immunotherapy for Prostate Cancer

### 6.3.1 Therapeutic Vaccines for Prostate Cancer

### 6.3.2 Checkpoint Inhibitors for Prostate Cancer

### 6.3.3 Adoptive Cell Therapy for Prostate Cancer

## 6.4 Immunotherapy for Lung Cancer

### 6.4.1 Monoclonal Antibodies for Lung Cancer

#### 6.4.1.1 Promising MAb Product Candidates for Lung Cancer

#### 6.4.1.2 Checkpoint Inhibitors for Lung Cancer

#### 6.4.1.3 Therapeutic Vaccines for Lung Cancer

#### 6.4.1.4 Promising Adoptive T Cell Transfer Product Candidates for Lung Cancer

## 6.5 Immunotherapy for Colorectal Cancer

### 6.5.1 Promising Monoclonal Antibody Product Candidates for Colorectal Cancer

### 6.5.2 Trials Using Checkpoint Inhibitors and Immune Modulators for Colorectal Cancer

### 6.5.3 Clinical Trials for Vaccines Indicated for Colorectal Cancer

### 6.5.4 Adoptive Cell Therapy for Colorectal Cancer

### 6.5.5 Oncolytic Virus Therapy for Colorectal Cancer

### 6.5.6 Adjuvant Immunotherapy for Colorectal Cancer

### 6.5.7 Cytokines for Colorectal Cancer

## 6.6 Immunotherapies in Development for Lymphoma

### 6.6.1 Therapeutic Vaccines in Development for Lymphoma

### 6.6.2 Checkpoint Inhibitors for Lymphoma

### 6.6.3 Adoptive T Cell Transfer for Lymphoma

### 6.6.4 Monoclonal Antibodies for Lymphoma

## 6.7 Immunotherapy for Kidney Cancer

### 6.7.1 Checkpoint Inhibitors for Kidney Cancer

### 6.7.2 Vaccines for Kidney Cancer

### 6.7.3 Adoptive Cell Therapy for Kidney Cancer

## 6.8 Dominance of MAbs and Vaccines in Cancer Clinical Research

## 6.9 Oncology Biologics Losing Patent Protection

# 7.0 CANCER INCIDENCE AND MORTALITY: AN OVERVIEW

## 7.1 Global Economic Burden of Cancer

## 7.2 Global Burden of Cancer

## 7.3 Top Five Most Frequent Cancers, Globally

### 7.3.1 Global Prevalence of Colorectal, Breast and Lung Cancers

### 7.3.2 Percentage of Top Three Cancers Diagnosed Globally

#### 7.3.2.1 Mortality due to Lung, Liver and Stomach Cancers

#### 7.3.2.2 Percentage of Death due to Lung, Liver and Stomach Cancers

## 7.4 Cancer Deaths in Women

## 7.5 Prevalence and Mortality for Cancer Types Addressed by Immunotherapy

### 7.5.1 Breast Cancer

#### 7.5.1.1 Worldwide Incidence of Breast Cancer and Mortality Rate by Geography

#### 7.5.1.2 Female Breast Cancer Incidence in the U.S

#### 7.5.1.3 Five Year Breast Cancer Survival Rates by Stage at Diagnosis and Age in the U.S

#### 7.5.1.4 Breast Cancer Incidence in Canada

#### 7.5.1.5 Breast Cancer Incidence and Mortality in Latin America

#### 7.5.1.6 Breast Cancer Incidence and Mortality in Europe

#### 7.5.1.7 Breast Cancer Incidence in Asia/Pacific

#### 7.5.1.8 Breast Cancer Incidence by Country

### 7.5.2 Gastric Cancer (Stomach Cancer)

#### 7.5.2.1 Incidence of Gastric Cancer in Top 15 Countries

### 7.5.3 Colorectal Cancer

#### 7.5.3.1 Global Incidence of Colorectal Cancer

#### 7.5.3.2 Worldwide Variations in the Incidence of Colorectal Cancer

#### 7.5.3.3 Risk Factors for Colorectal Cancer

#### 7.5.3.4 Colorectal Cancer Screening in the U.S

#### 7.5.3.5 Colorectal Cancer Incidence Rates in the U.S. by State

#### 7.5.3.6 Colorectal Cancer Mortality Rates (per 100,000) in the U.S. by States

### 7.5.4 Lung Cancer

#### 7.5.4.1 Non-Small Cell Lung Cancer (NSCLC)

#### 7.5.4.2 Global NSCLC Incidence

#### 7.5.4.3 Lung Cancer in Americas by Gender

#### 7.5.4.4 Tobacco Use and Lung Cancer

#### 7.5.4.5 Current Therapeutic Options for Lung Cancer

### 7.5.5 Glioblastoma

#### 7.5.5.1 Global Incidence of Glioblastoma

### 7.5.6 Kidney Cancer

#### 7.5.6.1 Global Incidence of Kidney Cancer

### 7.5.7 Blood Cancer

#### 7.5.7.1 Leukemia

#### 7.5.7.2 Blood Cancer in the U.S

### 7.5.8 Cervical Cancer

#### 7.5.8.1 Global Incidence of Cervical Cancer

### 7.5.9 Prostate Cancer

#### 7.5.9.1 Global Incidence of Prostate Cancer

#### 7.5.9.2 Prostate Cancer Incidence and Mortality by Geography

7.5.9.3 Prostate Cancer in the U. S

7.5.10 Melanoma

7.5.10.1 Skin Cancer in the U. S

## **8.0 GLOBAL ONCOLOGY MARKET ANALYSIS AND FORECAST TO 2025**

8.1 Global Oncology Market Geographical Analysis and Forecast to 2025

8.2 Top Companies in Oncology Drug Sales

8.2.1 Roche

8.2.2 Novartis

8.2.3 Pfizer

8.2.4 Bristol-Myers Squibb

8.2.5 Merck

8.2.6 Celgene

8.2.7 AstraZeneca

8.2.8 Eli Lilly

8.2.9 Takeda

8.3 FDA approved oncology drugs

8.4 Top Oncology Drug Market Forecast to 2025

8.5 Global Oncology Therapeutics Market by Cancer Type

## **9.0 MARKET FOR CANCER IMMUNOTHERAPY**

9.1 Key Drivers

9.2 Global Market for Cancer Immunotherapeutics by Geography

9.3 Global Market for Cancer Immunotherapy by Product Class

9.4 Global Market for Immunotherapy Drugs by Cancer Type

9.5 Global Market for Monoclonal Antibodies for Cancer by Type

9.5.1 Best Selling MABs

9.5.1.1 Market Forecast for Herceptin

9.5.1.2 Market Value and Forecast for Avastin

9.5.1.3 Global Market and forecast for Erbitux

9.5.1.4 Global Market and Forecast for Yervoy

9.5.1.5 Global Market and Forecast for Mabthera

9.5.1.6 Global Market and Forecast For Opdivo (Nivolumab)

9.5.2 Global Market and Forecast for Antibody Drug Conjugates (ADCs)

9.5.2.1 Global Market and Forecast for Adcetris

9.5.2.2 Global Market and Forecast for Keytruda

9.6 Global Market and Forecast for Cancer Vaccines

- 9.6.1 Global Market for Cancer Vaccines by Type
- 9.7 Global Market for Non-Specific Cancer Immunotherapeutics
  - 9.7.1 High Cost of MABs

## **10.0 COMPANY PROFILES**

- 10.1 Ablynx NV
- 10.2 Activartis Biotech GmbH
  - 10.2.1 GBM Vax Study
- 10.3 Advaxis Inc
  - 10.3.1 Advaxis' Technology
  - 10.3.2 Advaxis' Product Pipeline
    - 10.3.2.1 ADXS-HPV
    - 10.3.2.2 ADXS-PSA
    - 10.3.2.3 ADXS-cHER2
- 10.4 Aduro BioTech Inc
  - 10.4.1 Aduro's Technology
    - 10.4.1.1 CRS-207
    - 10.4.1.2 AUD-623
    - 10.4.1.3 ADU-741
    - 10.4.1.4 ADU-S100
- 10.5 Agenus Inc
  - 10.5.1 QS-21 Stimulon
- 10.6 AlphaVax Inc
  - 10.6.1 Alpha Vax's Technology
- 10.7 A. Menarini Industrie Farmaceutiche Riunite Srl
  - 10.7.1 MEN1112
- 10.8 Amgen Inc
  - 10.8.1 Vectibix (panitumumab)
  - 10.8.2 Blinatumomab (Blinicyto)
  - 10.8.3 Rilotumumab
- 10.9 Antigen Express Inc
  - 10.9.1 Li-Key Hybrid Vaccines (AE37)
- 10.10 Argos Therapeutics Inc
  - 10.10.1 AGS-003
- 10.11 Bavarian Nordic A/S
  - 10.11.1 Prostavac
  - 10.11.2 CV-301
  - 10.11.3 MVA-BN PRP

- 10.11.4 MVA-BN HER2
  - 10.11.4.1 MVA-BN Brachyury
- 10.12 Bellicum Pharmaceuticals Inc
  - 10.12.1 BPX-501
  - 10.12.2 BPX-201
  - 10.12.3 BPX-401
  - 10.12.4 BPX-601
  - 10.12.5 BPX-701
- 10.13 Biogen Idec Inc
  - 10.13.1 Rituxan (Rituximab)
  - 10.13.2 Gazyva (Obinutuzumab)
- 10.14 Biovest International Inc
  - 10.14.1 BiovaxID
- 10.15 Bristol-Myers Squibb Company
  - 10.15.1 Erbitux (cetuximab)
  - 10.15.2 OPDIVO (nivolumab)
  - 10.15.3 Yervoy (ipilimumab)
- 10.16 Cellectis
- 10.17 Cellerant Therapeutics Inc
  - 10.17.1 CLT-008
  - 10.17.2 CLT-009
- 10.18 Celldex Therapeutics
  - 10.18.1 Rindopepimut
  - 10.18.2 Glembatumumab vedotin (CDX-011)
  - 10.18.3 Varlilumab (CDX-1127)
  - 10.18.4 CDX-1401
  - 10.18.5 CDX-301
- 10.19 CEL-SCI Corp.
  - 10.19.1 Multikine
- 10.20 CureTech Ltd.
  - 10.20.1 Pidilizumab (CT-011)
- 10.21 Delta-Vir GmbH
  - 10.21.1 Treatment
- 10.22 Dendreon Corp.
  - 10.22.1 Provenge (Sipuleucel-T)
- 10.23 DenDrit Biotech USA
  - 10.23.1 MelCancerVac
- 10.24 DNATRIX Inc
  - 10.24.1 DNX-2401

- 10.25 Eli Lilly and Co.
  - 10.25.1 Erbitux (Cetuximab)
- 10.26 EMD Serono Inc
- 10.27 Etubics Corp.
- 10.28 Galena Biopharma Inc
- 10.29 Genentech Inc
  - 10.29.1 Avastin (bevacizumab) for Metastatic Colorectal Cancer
    - 10.29.1.1 Avastin and Interferon Alfa for Metastatic Kidney Cancer
    - 10.29.1.2 Avastin for Metastatic NLCLC
  - 10.29.2 Gazyva (obinutuzumab) for Chronic Lymphocytic Leukemia
  - 10.29.3 Herceptin (trastuzumab) for Breast Cancer
    - 10.29.3.1 Herceptin and Chemotherapy for Gastric Cancer
  - 10.29.4 Kadcyla (ado-trastuzumab emtansine)
  - 10.29.5 Perjeta (pertuzumab)
  - 10.29.6 Rituxan (rituximab)
  - 10.29.7 Genentech's Cancer Immunotherapy Pipeline Products
- 10.30 Genmab AS
  - 10.30.1 Ofatumumab
- 10.31 GlaxoSmithKline
  - 10.31.1 Arzerra (Ofatumumab)
  - 10.31.2 Cervarix
- 10.32 Gliknik Inc
- 10.33 GlobelImmune Inc
- 10.34 Heat Biologics Inc
- 10.35 Immatics Biotechnologies GmbH
- 10.36 ImmunoCellular Therapeutics Ltd.
- 10.37 Immunocore Ltd.
  - 10.37.1 Product Pipeline
- 10.38 ImmunoFrontier Inc
- 10.39 ImmunoGen Inc
  - 10.39.1 IMGN853
  - 10.39.2 IMGN529
  - 10.39.3 IMGN289
  - 10.39.4 IMGN779
- 10.40 Immunomedics Inc
- 10.41 Immunotope Inc
  - 10.41.1 IMT-1012 Immunotherapeutic Vaccine
- 10.42 Immunovaccine Inc
- 10.43 Inovio Pharmaceuticals Inc

- 10.44 Janssen Biotech Inc
  - 10.44.1 Doxil
  - 10.44.2 Procrit
  - 10.44.3 Zytiga
  - 10.44.4 Imbruvicia
- 10.45 Juno Therapeutics Inc
- 10.46 Kite Pharma Inc
  - 10.46.1 Kite Pharma's Technology
    - 10.46.1.1 eACT (engineered Autologous Cell Therapy)
    - 10.46.1.2 DC-Ad GM-CAIX
- 10.47 MabVax Therapeutics Holdings Inc
- 10.48 MedImmune LLC
- 10.49 Merck & Co., Inc
  - 10.49.1 Gardasil (Human Papillomavirus Quadrivalent (Types 6, 11, 16 and 18) Vaccine
    - 10.49.2 Keytruda (Pembrolizumab)
- 10.50 Merrimack Pharmaceuticals Inc
- 10.51 Morphotek Inc
  - 10.51.1 Farletuzumab (MORAb-003)
  - 10.51.2 Amatuximab (MORAb-009)
  - 10.51.3 Ontuxizumab (MORAb-004)
  - 10.51.4 MORAb-066
- 10.52 NewLink Genetics Corp.
- 10.53 Northwest Biotherapeutics Inc
- 10.54 NovaRx Corp.
- 10.55 OncoPep Inc
  - 10.55.1 PVX-410
- 10.56 Oncothyreon Inc
- 10.57 OSE Pharma SA
- 10.58 Oxford BioTherapeutics Ltd.
  - 10.58.1 Technologies
    - 10.58.1.1 OGAP – Cancer Targeting
    - 10.58.1.2 Antibody Development
    - 10.58.1.3 Antibody “arming”
  - 10.58.2 Lead Programs
    - 10.58.2.1 OX001/MEN1112
    - 10.58.2.2 OX002
    - 10.58.2.3 OX003
    - 10.58.2.4 OX004

- 10.59 Pique Therapeutics
- 10.60 Polynoma LLC
  - 10.60.1 MAVIS Trial
- 10.61 Prima BioMed Ltd.
- 10.62 Progenics Pharmaceuticals Inc
  - 10.62.1 PSMA Targeted Imaging Compound (1404)
  - 10.62.2 PSMA ADC Therapeutic
  - 10.62.3 Small Molecule Therapeutic (1095)
  - 10.62.4 Azedra
- 10.63 Regen Biopharma Inc
  - 10.63.1 HemaXellerate
  - 10.63.2 dCellVax
  - 10.63.3 Diffron C
- 10.64 Roche Holdings Inc
  - 10.64.1 Avastin (Bevacizumab)
  - 10.64.2 Gazyva/Gazyvaro (Obinutuzumab; GA101)
  - 10.64.3 Herceptin (Trastuzumab)
  - 10.64.4 Kadcyla (Trastuzumabum emtansinum)
  - 10.64.5 Mabthera (Rituximab)
  - 10.64.6 Perjeta (Pertuzumab)
- 10.65 Seattle Genetics Inc
  - 10.65.1 Adcetris (Brentuximab vedotin)
  - 10.65.2 Seattle Genetics' Collaborator Pipeline
- 10.66 Sorrento Therapeutics Inc
  - 10.66.1 Sorrento's Antibody Technologies
    - 10.66.1.1 G-MAB
    - 10.66.1.2 Antibody Drug Conjugates (ADCs)
- 10.67 Spectrum Pharmaceuticals Inc
  - 10.67.1 Zevalin
- 10.68 Synthon Pharmaceuticals Inc
- 10.69 TapImmune Inc
- 10.70 ThioLogics Ltd.
- 10.71 Transgene SA
- 10.72 TVAX Biomedical Inc
  - 10.72.1 TVI-Brain-1
  - 10.72.2 TVI-Kidney-1
- 10.73 Vaccinogen Inc
- 10.74 Viventia Biotechnologies Inc
- 10.75 Willex AG

10.76 Ziopharm Oncology Inc

## **11.0 CANCER IMMUNOTHERAPY MARKET PARTICIPANTS BY PRODUCT SEGMENT**

### **12.0 CAR T THERAPY**

12.1 Challenges Relating to Chimeric Antigen Receptor T Cells in Immunotherapy

12.1.1 Clinical Status of CD19 CAR-T Cells To Date

12.1.2 Clinical and Regulatory Challenges for Development of CAR T Cells

12.1.3 Key Regulatory Challenges Associated with CAR-T Development

12.1.4 Summary of Select CAR-T Products by Juno, Novartis and Kite

12.1.5 Clinical Benefit Versus Toxicity in CD19-Directed ALL Clinical Trials

12.1.6 How to Manage Toxicity of CAR-T Therapy

## **13.0 REGULATIONS PERTAINING TO IMMUNOTHERAPY REGULATION IN THE USA**

13.1 Center for Biologics Evaluation and Research (CBER)

13.1.1 Compliance and Surveillance

13.1.2 Extra Resources on Immunotherapeutics from the FDA

13.1.3 Cellular, Tissue and Gene Therapies Advisory Committee

13.1.4 Consumer Affairs Branch (CBER) Contact in FDA

13.1.5 FDA Regulations Pertaining to Immunotherapies

13.1.6 Case Study Ovarian Cancer Immunotherapy Regulations

13.1.6.1 Efficacy

13.1.6.2 Adverse Effects

13.1.7 Trial Design Considerations for Immunotherapy

13.1.8 Development of Immune-Related Response Criteria (irRC) & Clinical Endpoints Specific to Immunotherapies

## **14.0 REGULATIONS FOR IMMUNOTHERAPY IN JAPAN**

14.1 PMDA and Immunotherapy

14.1.1 Increasing the Efficiency in Immunotherapy Regulatory Review

14.1.2 Forerunner Review Assignment System

14.1.3 Revised Guidelines for Clinical Evaluation of Anti-Malignant Tumor Agents

14.1.4 Key Contacts Within the PMDA for Immunotherapeutics

## **15.0 EUROPEAN REGULATION AND IMMUNOTHERAPEUTICS**

- 15.1 Introduction
- 15.2 Challenges for Immunotherapy in EMEA
  - 15.2.1 EMA Status on Potency Testing
    - 15.2.1.1 In Vivo Potency Testing
    - 15.2.1.2 In Vitro Potency Testing
    - 15.2.1.3 Viable Cell Count
    - 15.2.1.4 Autologous Cell Based Products
    - 15.2.1.5 Reference Preparation
    - 15.2.1.6 Adjuvant Containing Immunotherapy Products
  - 15.2.2 EMA Status on Identifying hyper, Hypo or non-Responders
- 15.3 Challenges Relating to Biomarkers in Immunotherapy
- 15.4 Challenges Relating to Chimeric Antigen Receptor T Cells in Immunotherapy
- 15.5 Estimating Optimal Cut-Off Parameters
- 15.6 EU-Approved Immunotherapies in Melanoma
- 15.7 Key Contacts Within EMA for Immunotherapeutics

## **16.0 MANUFACTURING OF IMMUNOTHERAPIES**

- 16.1 Introduction
- 16.2 Generation of CAR-Modified T Cells
  - 16.2.1 What Co-Stimulation and Activity Domain is Optimal to Use?
  - 16.2.2 Optimizing Cell Culture Media
  - 16.2.3 Manufacturing Lentiviral Vectors
  - 16.2.4 Detection of Integrated CAR-Expressing Vectors
  - 16.2.5 Donor Lymphocyte Infusion Procedure
  - 16.2.6 Ex Vivo Costimulation & Expansion of Donor T Cells
  - 16.2.7 Infusion to the Patient
- 16.3 Manufacturing Devices and Instruments Required for Immunotherapy Production
  - 16.3.1 Leukapheresis
  - 16.3.2 Cell Counters and Analyzer
  - 16.3.3 Cell Seeding, Growth and Propagation
- 16.4 Good Manufacturing Procedure (GMP) for Immunotherapy
- 16.5 Case Study Production of Lentivirus Induced Dendritic Cells under GMP Conditions
- 16.6 Quality Control
- 16.7 Regulatory Affairs
- 16.8 Key Challenges in Manufacturing

- 16.8.1 Electroporation of T-cells
- 16.8.2 Allogenic CAR T cells
- 16.8.3 Relapse Rates are Critical
- 16.8.4 Antigen Negative Relapse
- 16.8.5 Incorporating Suicide Genes
- 16.8.16 Automation in Cell Therapy Manufacturing
- 16.8.17 Autologous Cell Therapy Manufacture Scale Up

## **17.0 SUPPLY CHAIN & LOGISTICS**

- 17.1 Introduction
- 17.2 Case Study: Juno Therapeutics

## **18.0 PRICING & COST ANALYSIS**

- 18.1 Introduction
- 18.2 CAR T Therapy Market Evaluation

## **19.0 CURRENT DEALS WITHIN THE CAR T MARKET**

## **20.0 CAR T THERAPY COMPANY CASE STUDIES**

- 20.1 Juno Therapeutics
- 20.2 Kite Pharma
- 20.3 Cellectis

## **APPENDIX**

Immuno-Oncology Highlights and Approvals over the last number of years Future  
Directions of Immuno-Oncology

## Index Of Figures

### INDEX OF FIGURES

- Figure 2.1: Components of an Antibody Drug Conjugate (ADC)
- Figure 2.2: Mechanism of Action of Antibody Drug Conjugates
- Figure 2.3: Ranking of Commonly Used Cytotoxin Warheads
- Figure 4.1: Number of Successful and Unsuccessful Melanoma Drugs
- Figure 4.2: Successes and Failures in Lung Cancer Medicine Development
- Figure 4.3: Successes and Failures in Brain Cancer Drug Development
- Figure 5.1: Ibritumomab Linked to Yttrium Radfionucleotide
- Figure 5.2: Kadcyla (Trastuzumab + DMI)
- Figure 6.1: Dominance of MAbs and Vaccines in Cancer Clinical Research
- Figure 7.1: Global Economic Burden of Cancer
- Figure 7.2: Number of Colorectal, Breast and Lung Cancer Cases Diagnosed Globally
- Figure 7.3 Percentage of Top Three Cancers Diagnosed Globally
- Figure 7.4: Number of Deaths due to Lung, Liver and Stomach Cancers Globally
- Figure 7.5: Percentage of Deaths due to Lung, Liver and Stomach Cancers
- Figure 7.6: Global Cancer Deaths in Women by Type of Cancer
- Figure 7.7: Worldwide Incidence of Female Breast Cancer and Mortality Rate by Geography
- Figure 7.8: Five Year Relative US Breast Cancer Survival Rates by Stage at Diagnosis & Age
- Figure 7.9: Breast Cancer Incidence and Mortality in Latin America
- Figure 7.10: Breast Cancer Incidence and Mortality in Europe
- Figure 7.11: Breast Cancer Incidence Rates in Asia/Pacific Region
- Figure 7.12: Top 15 Countries in Gastric Cancer Incidence
- Figure 7.13: Top 15 Countries in Colorectal Cancer Incidence
- Figure 7.14: Adults Aged 50-75 Years (%) That are Up-to-Date with Colorectal Screening Tests by State in the U.S
- Figure 7.15 Colorectal Cancer Incidence Rates (per 100,000) by State in the U.S
- Figure 7.16: Colorectal Cancer Mortality Rates (per 100,000) in the U.S. by States
- Figure 7.17: Top 15 Countries with Lung Cancer
- Figure 7.18: Global NSCLC Incidence
- Figure 7.19: Number of Smokers in China, India, Russia, the U.K. and U.S
- Figure 7.20: Global Incidence of Glioblastoma
- Figure 7.21: Global Incidence of Kidney Cancer
- Figure 7.22: Top 15 Countries in Leukemia Mortality
- Figure 7.23: Five Year Survival Rates in the U.S. for Blood Cancer Patients

Figure 7.24 Top 15 Countries in Cervical Cancer  
Figure 7.25: Top 15 Countries with Prostate Cancer  
Figure 7.26: Skin Cancer Death Rates for Top 15 Countries  
Figure 8.1: Global Market for Oncology Drugs to 2025  
Figure 8.2: Global Oncology Drug Sales by Top Companies, Through 2025  
Figure 8.3: Top Oncology Drugs, Through 2025  
Figure 8.4: Global Oncology Therapeutics Market by Cancer Type  
Figure 9.1: Global Cancer Immunotherapy Market, Through 2025  
Figure 9.2: Global Market for Immunotherapy by Product Class, Through 2025  
Figure 9.3: Global Market for Immunotherapy Drugs by Cancer Type, Through 2025  
Figure 9.4: Global Market for Monoclonal Antibodies for Cancer by Type, Through 2025  
Figure 9.5: Global and U.S. Market for Herceptin, Through 2025  
Figure 9.6: Global and U.S. Market for Avastin, Through 2025  
Figure 9.7: Global Market for Erbitux, Through 2025  
Figure 9.8: Global Market for Yervoy, Through 2025  
Figure 9.9: Global Market for Mabthera, Through 2025  
Figure 9.10: Global Market for Adcetris, Through 2025  
Figure 9.11: Global Market for Keytruda, Through 2025  
Figure 9.12: Global Market for Cancer Vaccines, Through 2025  
Figure 9.13: Global Market for Cancer Vaccines by Type, Through 2025  
Figure 9.14: Global Market for Cytokine Drugs for Cancer, Through 2025  
Figure 13.1: Clinical Regulatory Pathway – Conventional Route  
Figure 13.2: Clinical Regulatory Pathway – Option for Rapid Translation  
Figure 14.1: PMDA Total Review Period of Standard Drugs  
Figure 14.2: PMDA Total Review Period of Priority Drugs  
Figure 14.3: Number of Approved Recombinant Protein Products by PMDA  
Figure 14.4: Forerunner Review Assignment System Timeframe  
Figure 14.5: Adaptive Licensing and Accelerated Approval in Japan-US-EU  
Figure 15.1: CheckMate 066 Clinical Trial  
Figure 15.2: CheckMate 037 Clinical Trial  
Figure 16.1: Method of Generating CAR-Modified T Cells  
Figure 16.2: Clinical Activity, Cost Structure Patient Flow Chart of CAR-T Therapy  
Figure 16.3: Allogenic Versus Autologous Cell Manufacturing  
Figure 17.1: Streptamer® -Based Magnetic Bead Cell Isolation  
Figure 18.1: Annual Cost of Patented Cancer Therapeutics from 2000 to Today  
Figure 18.2: Cost of Nivolumab, Pembrolizumab & Ipilimumab per mg  
Figure 20.1 Juno Therapeutics CAR T Therapeutic Molecular Design  
Figure 20.2 Juno Therapeutics CAR T Therapeutic Mechanism of Action  
Figure 20.3 Juno Therapeutics T Cell Receptor (TCR) Technology Mechanism of Action

Figure 20.4: Streptamer® -Based Magnetic Bead Cell Isolation

Figure 20.5 Kite Pharma CAR Technology

Figure 20.6 Kite Pharma TCR Technology

## Index Of Tables

### INDEX OF TABLES

Table 2.1: Types of Immune Cells and their Functions
Table 2.2: FDA-Approved Cancer Immunotherapies
Table 2.3: FDA-Approved Monoclonal Antibodies (MAbs) to Treat Cancer
Table 2.4: Most Frequently Targeted Antigens by MAbs
Table 2.5: FDA-Approved Monoclonal Antibodies
Table 2.6: Cytotoxic Warheads Used in ADCs
Table 2.7: Targeted Indications for ADCs
Table 2.8: Antibody Drug Conjugates: Developmental Timeline
Table 2.9: Target Antigens for ADCs in Preclinical and Clinical Development
Table 2.10: Current ADCs Launched, Withdrawn and in Phase I/II/III Trials by Sponsor, Indication, Antigen, Cytotoxin and Linker
Table 2.11: MAb Products and Candidates that Recruit T Cells
Table 2.12: Bispecific MAbs in Clinical Trials Targeting Cancer by Indication and Company
Table 2.13: Bispecific Antibody Technology Platforms
Table 2.14: Side Effects of Some of the Approved Cancer Immunotherapy MAbs
Table 2.15: FDA-Approved Cancer Vaccines
Table 2.16: Cancer Vaccines in Development
Table 2.17: FDA-Approved Cytokines for Cancer Immunotherapy
Table 2.18: Cancer Indications Approved for IFN-alfa
Table 2.19: FDA-Approved Immune Checkpoint Modulators
Table 2.20: Immune Checkpoint Inhibitors in Clinical Development
Table 2.21: Cancer Immunotherapy: Timeline of Progress
Table 3.1: PD-1 Therapies Targeting either the PD-L1/L2 or PD-1 Receptor
Table 3.2: Overview of Clinical Trial Landscape for Top Five Anti-PD-1 and Anti-PD-L1 Drugs
Table 3.3: Nivolumab Efficacy from Expansion Cohorts of Study
Table 3.4: Key Clinical Trial Data of Pembrolizumab in Melanoma
Table 3.5: IMpower132 Phase III Data of Tecentriq, (atezolizumab RG7446) in NSCLC Patients
Table 3.6: Phase III IMmotion151 study results of Roche's Tecentriq (atezolizumab) and Avastin (bevacizumab) in Renal Cell Carcinoma
Table 3.7: Phase I Melanoma Data for Tecentriq
Table 3.8: Phase II Data for Pidilizumab in Diffuse Large B Cell Lymphoma (DLBCL)
Table 3.9: Phase II Melanoma Data for Pidilizumab Table 3.10: An Overview of Anti-

PD-1 Development by Company, Drug Candidate, Indication and Clinical Phase

Table 3.11: Clinical Development of CTLA-4, TIM3, and LAG3 Checkpoint Inhibitors by Company, Drug Candidate, Indication and Clinical Trial Stage

Table 3.12: Pivotal Phase III Results for Yervoy in Second-Line Patients with Metastatic Melanoma

Table 3.13: Updated Data from Phase III Clinical Study 024 for Yervoy

Table 3.14: Data from the Failed Phase III Study of Tremelimumab for Melanoma

Table 3.15: An Overview of Clinical Development of Dendritic Cell Therapies by Company, Drug Candidate, Indication and Clinical Phase

Table 3.16: Pivotal Phase III Results for Yervoy in Second-Line Patients with Metastatic Melanoma

Table 3.17: Phase I/IIa Results from Kite Pharma's CAR-T Therapy

Table 3.18: Cancer Vaccines in Development by Company, Drug Candidate, Indication & Clinical Phase

Table 3.19: Advaxis Phase II Results for Cervical Cancer Patients in India

Table 3.20: Phase II Data for Contego

Table 3.21: Valuable R&D Projects in Cancer Immunotherapy

Table 6.1: Cancer Types Addressed by Immunotherapies by Drug, Trade Name and Company

Table 6.2: Oncology Drugs Losing Patent Protection by 2020 by Product, U.S. Expiry Date and E.U. Expiry Date

Table 7.1: Global Cancer Statistics – Key Facts

Table 7.2: Top Five Most Frequent Cancers, Globally

Table 7.3: Estimated Breast Cancer Cases and Deaths in the U.S. by Age

Table 7.4: Estimated Canadian Breast Cancer Statistics

Table 7.5: Age-Standardized Breast Cancer Incidence Rate per 100,000 Women by Country

Table 7.6: Global Colorectal Cancer Incidence and Mortality Rates by Gender per 100,000 people

Table 7.7: Risk Factors for Colorectal Cancer

Table 7.8: Lung Cancer Incidence and Mortality Rate in Americas by Gender

Table 7.9: Current Therapeutic Options for Lung Cancer

Table 7.10: Estimated Number of New Leukemia Cases in the U.S.

Table 7.11: Estimated Deaths in the U.S. from Leukemia

Table 7.12: Estimated Deaths from HL and NHL in the U.S.

Table 7.13: Estimated Incidence and Deaths for Myeloma in the U.S.

Table 7.14 Global Prostate Cancer Incidence and Mortality Rates by Geography

Table 7.15: Incidence and Mortality Rates of Prostate Cancer in Americas

Table 7.16: Incidence and Mortality Rates for Melanoma in Americas

Table 8.1: Global Market for Oncology Drugs Through 2025
Table 8.2: Top Ten Companies in Oncology Sales, Through 2025
Table 8.3: Top Five Oncology Drugs, Through 2025
Table 9.1: Global Cancer Immunotherapy Market, Through 2025
Table 9.2: Global Market for Immunotherapy by Product Class, Through 2025
Table 9.3: Global Market for Immunotherapy Drugs by Cancer Type, Through 2025
Table 9.4: Global Market for Monoclonal Antibodies for Cancer by Type, Through 2025
Table 9.5: Global and U.S. Market for Herceptin, Through 2025
Table 9.6: Global and U.S. Market for Avastin, Through 2025
Table 9.7: Global Market for Cancer Vaccines, Through 2025
Table 9.8: Global Market for Cancer Vaccines by Type, Through 2025
Table 9.9: Projected Market for the Forthcoming DCVax-L and Imfinzi
Table 9.10: Annual Cost of MAbs in the U.S. by Product, Indication and Biomarker
Table 10.1: Ablynx's Product Pipeline
Table 10.2: Aduro's Product Pipeline
Table 10.3: Agenus' Product Pipeline
Table 10.4: AlphaVax Cancer Immunology Product Pipeline
Table 10.5: Amgen's Product Pipeline
Table 10.6: Antigen Express' Cancer Therapeutic Pipeline
Table 10.7: Argos' Cancer Product Pipeline
Table 10.8: Bavarian Nordic's Product Pipeline
Table 10.9: Bellicum's Pipeline Product Candidatea
Table 10.10: Biogen's Oncology Pipeline
Table 10.11: Bristol-Myers Squibb's Pipeline Products in Cancer Immunotherapy
Table 10.12: Cellectis' Products in Development
Table 10.13: Cellerant's Product Pipeline
Table 10.14: Celldex's Therapeutic Pipeline
Table 10.15: CEL-SCI's Immunotherapy Products in Development
Table 10.16: EMD Serono's Product Pipeline
Table 10.17: Etubic's Product Pipeline
Table 10.18: Galena's Product Pipeline
Table 10.19: Genentech's Cancer Immunotherapy Pipeline Products
Table 10.20: Genmab's Products in Development
Table 10.21: Gliknik's Product Pipeline
Table 10.22: GlobelImmune's Product Pipeline
Table 10.23: Heat Biologic's Product Pipeline
Table 10.24: Immatics Biotechnology's Product Pipeline
Table 10.25: ImmunoCellular's Product Pipeline
Table 10.26: Immunomedics' Late-Stage Antibody-Based Therapies

Table 10.27: Immunovaccine's Product Pipeline
Table 10.28: Inovio Pharmaceuticals Product Pipeline
Table 10.29: Juno Therapeutics' Current Pipeline
Table 10.30: Kite Pharma's Product Pipeline
Table 10.31: MabVax's Product Pipeline
Table 10.32: MedImmune's Products in Development
Table 10.33: Merck's Pipeline of Cancer Immunotherapy Products
Table 10.34: Merrimack's Product Pipeline
Table 10.35: NewLink Genetics' Product Pipeline
Table 10.36: Northwest's Product Pipeline
Table 10.37: NovaRx Clinical Development Pipeline
Table 10.38: Oncothyreon's Immunotherapy Product Pipeline
Table 10.39: OSE Pharma's Product Pipeline
Table 10.40: Pique Therapeutics' Product Pipeline
Table 10.41: Prima BioMed's Pipeline
Table 10.42: Progenics Pharmaceutical's Pipeline
Table 10.43: Roche Holding's Cancer Immunotherapy Product Pipeline
Table 10.44: Seattle Genetics' Pipeline Products
Table 10.45: Seattle Genetics' Collaborator Pipeline
Table 10.46: Synthon Biopharmaceuticals' Pipeline
Table 10.47: TapImmune's Product Pipeline
Table 10.48: ThioLogic's Product Pipeline
Table 10.49: Transgene's Product Pipeline
Table 10.50: Vaccinogen's Product Pipeline
Table 10.51: Viventia's Product Pipeline
Table 10.52: Willex's Product Pipeline
Table 10.53: Ziopharm's Products in Development
Table 11.1: Cancer Immunotherapy Market Participants by Product Segment
Table 12.1: Selected CD19-directed Product Candidates in Clinical Trials by Costimulatory & Binding Domains, Starting Cell Population, Vector and Ablation Technology
Table 12.2: Select CD19-Directed ALL Clinical Trials
Table 12.3: Select Anti-CD22 CAR-T Clinical Projects
Table 13.1: CBER Compliance and Surveillance Activities
Table 13.2: Contacts for the Cellular, Tissue and Gene Therapies Advisory Committee, FDA
Table 14.1: Key Contacts Within PMDA, Japan
Table 15.1: Contact Details for EMA Immunotherapy Experts
Table 16.1: General Technical and Personnel Requirements of a GMP, QC, QA, FDA

Regulated Cell Therapy Manufacturing Facility

Table 16.2: Technician/Scientific Requirements for CAR T Manufacturing

Table 16.3: Selection of Apheresis Instruments Currently on the Market

Table 16.4: Selection of Cell Counters and Analyzer Instruments Currently on the Market

Table 16.5: Main Objectives of GMP Manufacturing Immunotherapeutics

Table 16.6: Main Objectives of Quality Control While Manufacturing Immunotherapeutics

Table 16.7: Main Objectives of Regulatory Affairs During Manufacturing Immunotherapeutics

Table 16.8: CAR-T Studies Using mRNA Transfection Electroporation

Table 16.9: Challenges for Autologous Cell Therapy Manufacture

Table 16.10: Current Company/Institutions with Suicide Gene CAR T Projects

Table 16.11: Advantages of Using Automated Cell Therapy Manufacturing

Table 16.12: Main Drivers to Implement Automated Cell Therapy Manufacturing

Table 16.13: Main Benefits of Automated Cell Therapy Manufacturing

Table 16.14: Advantages & Disadvantages of Autologous Cell Therapy Manufacture Scale Up

Table 17.1: Juno Therapeutics Manufacturing Facility Objectives

Table 18.1: Current Juno Therapeutics Trials and CAR T Products

Table 19.1: Current CAR T Business Deals

Table 20.1: Juno Therapeutics Target Biomarker Portfolio

Table 20.2 Juno Therapeutics CAR Technology

Table 20.3 Juno Therapeutics T Cell Receptor (TCR) Technology

Table 20.4 Juno Therapeutics Clinical Pipeline by Target, Product and Trial

Table 20.5: Select CD19-Directed ALL Clinical Trials

Table 20.6: Select Anti-CD22 CAR-T Clinical Projects

Table 20.7 Juno Therapeutics Manufacturing Facility Objectives

Table 20.8 Current Kite Pharma CAR T Clinical Studies and Trials

Table 20.9 Current Kite Pharma TCR Clinical Studies and Trials

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