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Antibody-Drug Conjugates 2014 - a Business, Technology & Pipeline Analysis

https://marketpublishers.com/r/AF1085B049AEN.html
Date: January 2014
Pages: 347
Price: US$ 2,873.00 (Single User License)
ID: AF1085B049AEN

Abstracts

Antibody-Drug Conjugates 2014 – A Business, Technology & Pipeline Analysis

The report entitled**Antibody-Drug Conjugates 2014 – A Business, Technology & Pipeline Analysis** published in January 2014 is based on the evaluation of more than 90 companies. The report analyzes established and new antibody-drug conjugate (ADC) technologies, business activities and opportunities and assesses more than 100 ADC development and research programs. The commercial value of ADC technologies, ADC products and ADC product candidates is described and valued by means of sales, product prices, company market capitalization, initial public offerings, venture capital and private equity financing, infrastructure investments and financial deal terms. Business deal activities in form of acquisitions, licensing and collaboration agreements and joint ventures between pharma, biotech and the service industry serve to identify those technologies of interest for stakeholders in the ADC industry.

The report was built from the bottom-up by first elaborating Company Profiles from information retrieved from La Merie‘ proprietary antibody-drug conjugate database, scientific literature and abstracts, company press releases, company presentations, financial disclosures, clinical trials databases and company websites. A structured analysis was performed for the ADC pipeline, for stakeholders of the ADC industry, for state-of-the art and emerging ADC technologies, for the ADC manufacturing and service industry, and business activities. The report identifies trends for those ADC technologies (target, antibody, drug, linker and conjugation systems) which are of interest for the industry.

The report includes in the Addendum a tabulated Competitor Analysis and lists all relevant business transactions of the last two to three years.

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Spefically, the ADC pipeline analysis describes preclinical, non-clinical and clinical ADC projects and R&D programs. It evaluates the ADC targets in relation to drug and linker systems, and also investigates the clinical success and reasons for failures of antibody-drug conjugates.

The stakeholder analysis compares companies with their peers in the respective group of development, technology and manufacturing companies and further categorizes them within the respective group to find out their competitive situation.

The analysis pays special attention to the importance of target selection, to emerging trends of new targeting moieties beyond full-length, canonical antibodies, to the expansion of the use of ADCs in non-cancer indications, to the opportunities arising from new site-specific and from polymer/nanoparticel-based conjugation systems and the most promising new payloads for ADCs.

Crticial issues of ADCs, such as therapeutic window, druggable targets, manufacturing and financing are addressed and opportunities outlined.

Who will benefit from the report:

Investors

Business developers

Licensing managers

Technology officers

R&D Management

Business & Competitive Intelligence Analysts

Scientific Analysts

R&D Planning

Portfolio Managers

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What will you find in the report?

Company profiles of ADC stakeholders

ADC drug profiles

ADC business agreements

ADC pipeline description and analysis

Clinical attrition rate of ADCs and reasons for failure

ADC target description and analysis

Current and future drugs, linkers and conjugation systems

Industry preferences for drugs and linkers

Alternative targeting moieties

New uses of ADCs and immunoconjugates

CMOs for manufacturing of ADCs

Competitors in development, technology or manufacturing

Commercial value of ADC products and technologies

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ADDENDUM

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About

The field of antibody-drug conjugates (ADC) has seen an explosive growth during the last few years. The number of ADC companies evaluated for preparation of the present report was nearly triple that described in the previous edition of the ADC report in the year 2011. Similarly, the number of scientific publications found in PubMed for the search item „antibody-drug conjugate'1 in the year 2013 was three-times that of 2011 or even 9-times higher than in the years before. First generation ADC technology has matured as evidenced by the regulatory approval and marketing of the first two ADC products against hematologic and solid malignancies with the two main ADC technologies from ImmunoGen and Seattle Genetics. Both companies utilize cell- cycle dependent tubulin polymerization inhibitors (maytansine and auristatin derivatives) conjugated via cleavable or stable linkers to natural lysine or cysteine residues in the targeting antibody. As a result of this conjugation technology, the drug-antibody ratio may be variable and the product heterogenous with potential impact on efficacy, safety and pharmacokinetics.

Resistanc of cancer cells to currently employed drug payloads of ADCs adds a liirther parameter for optimization of ADCs.

Based on the current state of the art, this report describes the emerging next generation ADC technologies regarding target selection, novel antibody and alternative targeting moiety formats, novel drugs and conjugation systems. The report pays special attention to the commercial relevance and value of these technologies and highlights those picked-up by Big Pharma setting a trend for the first wave of new ADCs based on next generation ADC technologies.

You will find in this report detailed profiles of nearly 100 companies active in the field including their financial history, deals, partnerships, technologies, success and failures of ADC projects and their profiles. Based on this basic information, the ADC pipeline, stakeholders in the field, ADC technologies and business opportunities are analyzed. An Addendum lists ADC projects categorized by various variablers and business agreements for collaborations, licensing deals and M&A. Scientific references are provided and non-scientific sources of information are disclosed with hyperlinks.

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