

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

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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.

Specifically, 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/nanoparticle-based conjugation systems and the most promising new payloads for ADCs.

Critical 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

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

Contents

ABBREVIATIONS

1 EXECUTIVE SUMMARY

2 INTRODUCTION AND OVERVIEW OF THE REPORT

3 ANTIBODY-DRUG CONJUGATES: PIPELINE DESCRIPTION AND ANALYSIS

- 3.1 ADC Pipeline overview and definitions
- 3.2 Targeting moieties in ADCs and Immunoconjugates
- 3.3 Drugs & linkers in ADCs and Immunoconjugates
- 3.4 Targets in ADCs and indications
- 3.5 Companies clinically developing ADCs
- 3.6 Clinical success and attrition rates of ADCs

4 STAKEHOLDERS IN ANTIBODY-DRUG CONJUGATES AND IMMUNOCONJUGATES

- 4.1 Development companies
 - 4.1.1 Big Pharma with ADCs or Immunoconjugates
 - 4.1.2 Pharma and Biotech Companies with ADCs or Immunoconjugates
- 4.2 Technology companies
 - 4.2.1 Integrated ADC technology and development companies
 - 4.2.2 Companies with target discovery
 - 4.2.3 Companies with alternative targeting moieties
 - 4.2.4 Site-specific conjugation technology companies
 - 4.2.5 Companies with polymeric/nanoparticle payload carriers
 - 4.2.6 Companies with new payloads
- 4.3 Manufacturing companies

5 ADC TECHNOLOGIES

- 5.1 Targets for ADC
- 5.2 Antibodies for ADCs
- 5.3 Linkers and conjugation strategies
- 5.4 Drugs as payload

6 BUSINESS WITH ANTIBODY-DRUG CONJUGATES

6.1 Commercial valuation of ADC technologies and products

6.1.1 ADC product sales

6.1.2 Market capitalization of ADC companies

6.1.3 Value of Initial Public Offerings (IPOs) of ADC biotech companies

6.1.4 Venture capital and private equity financing of ADC technology and product companies

6.1.5 Acquisitions of ADC technology companies

6.1.6 Financial deal terms of agreements between biotech and pharma

6.1.7 ADC collaborations biotech - biotech

6.1.8 ADC infrastructure investments

6.2 Business opportunities with antibody-drug conjugates

6.2.1 Therapeutic window

6.2.2 Drug resistance

6.2.3 Druggable targets

6.2.4 Non-cancer indications

6.2.5 Manufacturing of ADCs

6.2.6 Finance industry

7 ADC & IMMUNOCONJUGATE COMPANY PROFILES

7.1 Development Companies

7.2 Technology Companies

7.3 Contract Manufacturing Companies

8 REFERENCES

9 TABLES

Table 1 Overall pipeline of Antibody-Drug Conjugates and Immunoconjugates

Table 2: Targeting moieties used in ADCs and Immunoconjugates

Table 3: Drugs used in ADCs

Table 4: Other and novel payloads used in ADCs and Immunoconjugates

Table 5: Stable and cleavable linkers for ADCs with auristatins or maytansinoids

Table 6: Targets of ADCs with linkers, drugs, indications and stage

Table 7: ADCs against CD22

Table 9: ADCs against Her2

Table 9: ADCs against CD19

Table 10: ADCs against PSMA
Table 11: ADCs against EGFR / EGFRvIII
Table 12: ADCs against MUC1
Table 13: ADCs against CD37
Table 14: ADCs against CD70
Table 15: ADCs against CD20
Table 16: Companies clinically developing ADCs and related technologies
Table 17: Reasons for Discontinuation of Clinical Stage Antibody-Drug Conjugates
Table 18: Comparison of reasons for failure between ADCs and naked antibodies
Table 19: Overview of ADC & Immunoconjugate activities of major pharma & biotech companies
Table 20: Synopsis of Big Pharma's ADC activities
Table 21: Synopsis of pharma and biotech development companies' ADC activities
Table 22: Synopsis of integrated ADC technology and development companies
Table 23: Synopsis of companies with target discovery
Table 24: Synopsis of companies with alternative targeting moieties
Table 25: Synopsis of site-specific conjugation technology companies
Table 26: Synopsis of companies with polymeric/nanoparticle payload carriers
Table 27: Synopsis of companies with new payloads
Table 28: Overview of CMOs for ADCs
Table 29: Synopsis of ADC CMOs
Table 30: Market capitalization of Seattle Genetics and ImmunoGen 2011-2014
Table 31: Financing of ADC technology and product companies
Table 32: Financial terms of ADC technology deals biotech – pharma 2011-2014
Table 33: R&D collaborations between biotech companies

ADDENDUM

I: Competitor Analysis

Adcetris Pipeline

ADCs with Auristatin Derivatives

ADCs with Pyrrolobenzodiazepine (PBD) Derivatives

Kadcyla Pipeline

ADCs with Maytansine (DM) Derivatives

ADCs with Irinotecan Derivatives

ADCs with Calicheamicin Derivatives

ADCs with Doxorubicin as Payload

ADCs with Duocarmycin Derivatives

ADCs with Novel Payloads

ADCs with Not-Disclosed Payloads

ADCs with Novel Conjugation Systems

ADCs with Alternative Antibody Formats

Immunoconjugates with Peptide-based Targeting Moiety

Immunoconjugates with Protein-based Targeting Moiety

Immunoconjugates with Small Molecule-based Targeting Moiety

ADCs and Immunoconjugates in Non-Cancer Indications

II: Agreements

R&D Collaboration Agreements biotech – pharma

R&D Collaboration Agreements biotech - biotech

Collaboration Agreements CMO - CMO

R&D Licensing Agreements biotech - pharma

R&D Licensing Agreements biotech - biotech

Merger & Acquisition Agreements

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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