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Antibody-Drug Conjugates 2016: Perspectives & Opportunities - a Pipeline, Technology, Stakeholder & Business Analysis

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Abstracts

This report describes and analyzes the situation of antibody-drug conjugates as of November 2015 regarding

ADC pipeline,

ADC technologies,

ADC stakeholders and

ADC business opportunities and commercial perspectives.

Although the initial enthusiasm about antibody-drug conjugates has made room for a more realistic understanding, the prospects for success of ADC drug candidates remain good and are based on a well-filled pipeline, increasing adoption of next generation ADC technologies, lessons learned from failures, a balanced mixture of stakeholders and a variety of options for funding of ADC developments. About 70 ADCs are in clinical and pre-IND stages of development and at least the same number of ADC programs are in preclinical R&D.

For the first time in 2015, combined sales of the approved and marketed ADC products Adcetris and Kadcyla will surpass the sales limit of US$ 1 billion. The pipeline of ADCs

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and immunoconjugates in advanced clinical development gives the chance of approval of further ADCs in the near- and mid-term future. The clinical attrition rate of ADCs is lower, i.e. better, than that of conventional, naked antibodies in oncology. The availability of next generation ADC technologies allows to select case by case the appropriate linker and payload. Site-specific conjugation technologies with and without engineering of the antibody generate homogenous products. Novel payloads provide the basis for enhanced antitumor activity. Prodrug concepts and polymeric carrier systems may not only contribute to a higher therapeutic index, but also boost efficacy by targeted delivery of a higher number of payloads than in conventional ADCs. Competition by ADCs directed against the same target is relatively low, except for clinically and commercially validated Her2 which is ideal to validate new technologies. However, targets are still a bottleneck with the attractive consequence that companies with successful target identification capabilities are highly rewarded by investors and business partners.

Nearly all major pharma and biotech companies have ADC programs, although with different strategies of how to gain access to ADC technologies. Few have established proprietary in-house capabilities, most still rely on outside technology providers. However, the duopoly of conventional ADC technology providers is converting into a more differentiated, heterogenous field of ADC technologies and technology providers.

This report entitled „Antibody-Drug Conjugates 2016: Perspectives & Opportunities - a Pipeline, Technology, Stakeholder & Business Analysis“ is based on the analysis of more than 90 companies, more than 100 ADC drug profiles and more than 26 ADC technologies and components. Sources of information are provided by 274 scientific references and numerous non-scientific references, e.g. press releases, stock exchange disclosures, presentations, annual reports, fact sheets (with hyperlinks leading to source of information). The report also describes and analyzes business deals in the ADC field, e.g. collaboration and license agreements, mergers and acquisitions, financial transactions (divestments, public offerings, private equity and venture capital fund-raising).

Coverage of this ADC report:

Next-to-market ADCs

ADC Drug Profiles: clinical, pre-IND, preclinical

Target Competition by ADCs

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