**Description:**

Pancreatic Cancer Therapeutics in Major Developed Markets to 2021 - Strong Late Stage Pipeline Holds Promise for Increasingly Diverse Market Landscape

**Summary**

Pancreatic Cancer (PC) is a disease predominately of the elderly with ~75% of PC cases being diagnosed in patients over 75 years old. PC proliferates rapidly, is asymptomatic at its earliest stages and when symptoms do present themselves they are non-specific. There are currently no early detection methods in use for PC. Currently the best option for patient survival is resection which can triple five year survival rate to 15% compared to the unresectable stages of PC. Regrettably ~83% of patients present with advanced unresectable disease and patient prognosis is extremely poor. The majority of patients ultimately develop resistant disease, for whom treatment options have historically been limited, with treatment involving fluorouracil as a monotherapy or used in a combination therapy being standard. The recent approval of Onivyde for gemcitabine refractory disease in 2015 has improved survival of resistant patients, but there is a clear clinical need to diversify the treatment options for this patient cohort.

The current late-stage drugs in development for PC address this clinical need; however, results so far have been limited in their efficacy, with none demonstrating clinically transformative efficacy or safety. As a result, the growth in PC prevalence as a result of a global aging population, increasing diabetes and obesity prevalence is expected to be the key driver of this market throughout the forecast period.

**Scope**

Global revenues for the PC market are forecast to rise at a moderate CAGR of 7.6% from $1.746bn in 2014 to $2.92bn in 2021.
- What factors are driving the market growth?
- How can the factors limiting growth be overcome in the future?

The variation in mechanism of action has shifted away from the traditional chemotherapies, which dominate the marketed products, but account for only 7% of the pipeline. 44% of the pipeline are drugs inhibiting signal transduction.
- What are the dynamics of the remaining 49% of the pipeline?
- How does this reflect the need for novel targeted therapies?

Key mechanisms of action across the pipeline include cancer immunotherapies against IAP repeat containing proteins, whole cell vaccines and targeted therapies against the PI3K/Akt/mTOR
- What is the scientific rationale behind these targets?
Several drugs are expected to be approved during the forecast period: TH-302, ruxolitinib phosphate, HyperAcute Pancreas, G17DT and clivatuzumab tetraxetan. However, their sales will be limited by their expected high costs.
- Where will these novel therapies fit into the current treatment algorithm for PC?
The pipeline therapies, G17DT is expected to have the strongest performance, with revenues of $141m by 2021.
- How will the other late stage pipeline drugs perform commercially?

Reasons to buy

This report will allow you to -
- Understand the current clinical and commercial landscape by considering disease pathogenesis, diagnosis, prognosis, and the treatment options available at each stage of diagnosis.
- Visualize the composition of the pancreatic cancer market in terms of dominant molecule types and targets, highlighting the current unmet needs and how they can be addressed to allow a competitive understanding of gaps in the current market.
- Analyze the pancreatic cancer pipeline and stratify by stage of development, molecule type, and molecular target.
- Visualize the clinical safety and efficacy of late-stage pipeline drugs via a detailed heat map, outlining the results across major clinical trial endpoints.
- Understand the growth in patient epidemiology, annual therapy costs, and market revenues for the pancreatic cancer market globally and across the US, UK, France, Germany, Italy, Spain, Japan, and Canada.
- Identify commercial opportunities in the pancreatic cancer deals landscape by analyzing trends in licensing and co-development deals.

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Companies Mentioned:
NA

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