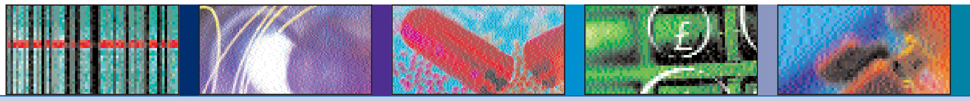
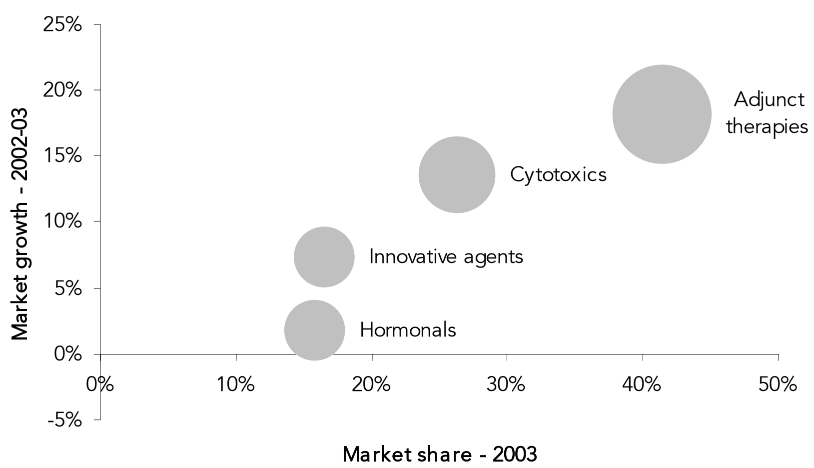


BUSINESS INSIGHTS

The Cancer Market Outlook to 2009

Figure 2.1: Competitive dynamics of drug classes within the global cancer market, 2003



Source: The Cancer Market Outlook to 2009

'The overall cancer market is forecast to grow from $38.5bn in 2003 to $53.1bn in 2009. This rate of growth represents a decline from previous years in the market, and is indicative of the maturity of the hormonal and cytotoxic classes, which are suffering from the introduction of generic competition for key traditional revenue generators...'

"Near-term growth in the global cancer market will be driven by the continued up-take of existing innovative cancer products and the launch of novel compounds currently in R&D..."

Assess potential breakthrough compounds in cancer treatment, identify **key unmet needs** and **areas of future revenue growth** with this NEW report...

Business Insights

The Cancer Market Outlook to 2009

Table 1.1: The global cancer market, 1999-2003

Drug class	1999 ($)	2000 ($m)	2001 ($m)	2002 ($m)	2003 ($m)	Growth 2002–03 (%)
Cytotoxics	6,948	7,925	8,651	8,925	10,142	13.60
Hormonals	4,855	5,237	5,720	5,960	6,066	1.80
Innovative agents	1,650	2,078	3,776	5,932	6,368	7.30
Adjunct therapies	8,781	9,908	11,321	13,500	15,955	18.20
Total	**22,234**	**25,148**	**29,468**	**34,317**	**38,531**	**12.30**

Source: The Cancer Market Outlook to 2009

"The value of the cytotoxic market grew by 13.6% in 2003, following disappointing sales growth in 2002. The strong sales performance for market leaders such as Taxotere, Gemzar and Paraplatin were not offset in 2003 by further declines in the sales of Taxol following a peak in the availability of generic versions of paclitaxel in the US..."

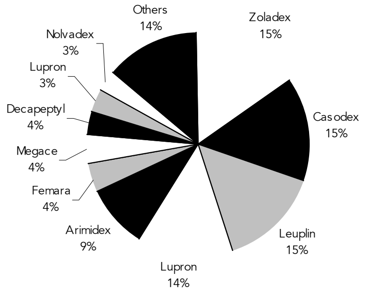
The NEW management report '**The Cancer Market Outlook to 2009**', quantifies the patient potential in different cancer sub-markets and provides benchmarks for new cancer drug development and marketing strategies. **This report identifies key areas of unmet need and profiles the market leading products of the future**.

The global cancer market is characterized by a mix of established gold standard therapies and new innovative products rapidly capturing market share. While a number of blockbuster therapies lose patent protection, heavy R&D investment has resulted in 400 potential new drugs currently progressing through clinical trials. Significant unmet needs and high incidence of disease continue to drive market growth, leaving a number of companies competing to improve treatment efficacy and drive market share.

Use this report to quantify patient potential in cancer sub-markets, **benchmark your portfolio against the eight leading companies in the sector and devise strategies to counter threats to your market position in the next five years**.

Key findings of the report

Figure 2.4: Market share of the leading hormonal therapies, 2003



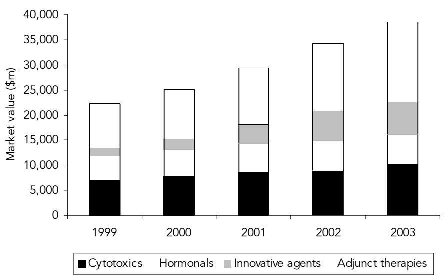
Source: The Cancer Market Outlook to 2009

"Whilst most of the hormonal drug classes have experienced a decline in sales growth in recent years, the aromatase inhibitors, representing the smallest class in the hormonal market, have not. A key contributor to the overall growth rate of this class has been AstraZeneca's Arimidex (anastrozole), which recorded sales of $519m in 2003, an increase of 56.8% on $331m in 2002..."

- **The global cancer market is forecast to grow from $38.5bn in 2003 to $53.1bn in 2009**, representing an average annual growth rate of 5.49%.
- **In the US alone, it is predicted that 217,000 new cases of breast cancer will be diagnosed in 2004**. Although mortality is decreasing and the disease is relatively well understood, significant unmet needs exist.
- **The total adjunct therapy market was valued at $16.0bn in 2003**, **a 18.2% increase on 2002 sales**. Market growth was driven by the strong sales performance of the new generation HGF products, in particular Amgen's Aranesp (darbepoietin) and Neulasta (pegfilgrastim).
- **In 2003, BMS maintained its position as the leading player in the cancer market** with total oncology sales of $4.1bn equating, to a 10.6% market share.
- **The innovative cancer therapy class is forecast to almost double in value during the forecast period, from $6.4bn in 2003 to 12.5bn in 2009**, by which time it will overtake the cytotoxic drug classes in value terms.

The answers to your questions

Figure 2.3: The global cancer market, 1999-2003



Source: The Cancer Market Outlook to 2009

"Figure 2.3 shows a market share and growth analysis of the four main drug classes in the cancer market. Of particular interest is the rapid emergence of the innovative cancer drugs within the market. Given current growth rates, this class, currently dominated by cytokine and monoclonal antibody products, is poised to match the cytotoxics market within six years in terms of sales..."

- What will the key areas of growth in the cancer market be in the next 5 years?
- What are the key unmet needs in the global cancer market?
- What is the most effective drug launch and brand building strategy in each different cancer treatment setting?
- What will the leading blockbusters of the future be in the global cancer market?
- What impact will key patent expiries and the launch of generic products have on the global cancer market?
- What impact will the launch of new angiogenesis inhibitors and other novel therapies have on the cancer market?

Why you should order your copy today

Table 4.7: Comparison of market attractiveness, 2009

	Sales ($m)				CAGR (%)
Brand	**2003**	**2005**	**2007**	**2009**	**2003-09**
Cytotoxics	10,142	11,725	12,740	12,841	4.01
Hormonals	6,066	6,747	6,796	6,440	1.00
Innovative agents	6,368	8,010	10,150	12,495	11.89
Adjunct therapies	15,955	18,950	20,375	21,325	4.95
Total	**38,531**	**45,432**	**50,061**	**53,101**	**5.49**

Source: The Cancer Market Outlook to 2009

"The innovative cancer therapy class is forecast to almost double in value during the forecast period, from $6.4bn in 2003 to $12.5bn in 2009, by which time it will begin overtaking the cytotoxic drug classes in terms of sales. Due to increasing generic competition, growth in the hormonals market is expected to level off towards the end of the forecast period, although sales should peak at an estimated $6.8bn in 2007..."

- **Benchmark the performance of competing products** by indication, drug class and marketing company.
- **Determine the impact of patent expiry on major gold standard products**, including Nolvadex, Intron A and Lupron.
- **Examine the strategic implications of industry developments for established or recently approved therapies**, including AstraZeneca's Iressa, Millennium's Velcade and Corixa and GSK's Bexxar.
- **Evaluate the latest regulatory implications** on future drug marketing policy and drug development.
- **Understand the benefits of developing drugs initially for niche indications**, thereby avoiding the greater competition and more rigorous regulatory process associated with drug development for more prevalent cancers.
- **Identify strategies used to position product franchises** of both established players and new entrants.

The Cancer Market Outlook to 2009

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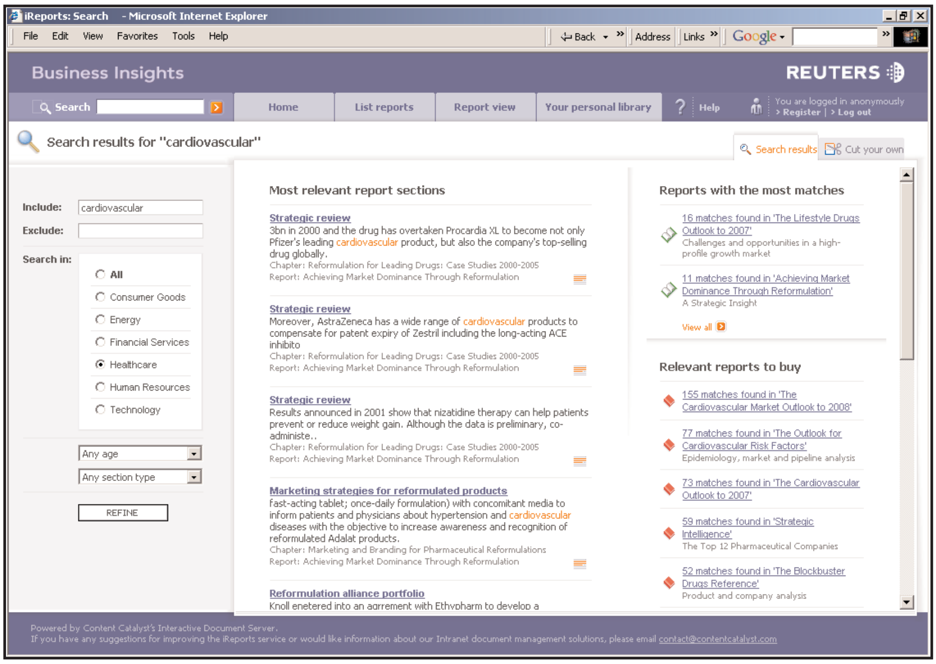

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