

# Breast cancer Therapeutic and Drug Pipeline Review H1

*Breast cancer Treatment Pipeline Review H1 2017*

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/EINPresswire.com/ -- Summary

**Breast cancer** is a malignant neoplasm that begins in the breast tissue. Most breast cancers are invasive cancers that have grown beyond the ducts or lobules and can metastasize to other parts of the body through the bloodstream and the lymphatic system. Broadly, patients can be segmented into two types: the human epidermal growth factor receptor (HER) 2-negative segment and the HER2-

positive segment. HER2-positive breast cancer is aggressive and, historically, has had a worse overall survival than HER2-negative disease, which is considered less aggressive.



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In HER2-negative breast cancer, a number of different factors can influence the choice of therapy that a patient receives, including the stage of the cancer, the hormonal receptor status of the cancer (ER-positive or -negative and PR-positive or -negative) and whether the patient is a BRCA-mutation carrier. Triple-negative breast cancer (TNBC) is a setting with incredibly high unmet needs, with no targeted therapy options being available. Chemotherapy is the mainstay of treatment in this setting. For HR-positive disease, endocrine therapies are the primary treatment.

Survival for HER2-positive breast cancer patients has increased, due to established disease management strategies using numerous combinations of chemotherapy along with targeted therapies such as Herceptin, Tykerb (lapatinib) and Perjeta (pertuzumab). These newer therapies are expected to significantly improve survival outcomes in all lines of the disease. The introduction of Herceptin, the first HER2-targeting agent for metastatic disease, greatly improved the outcome of patients with HER2-positive breast cancer, bringing survival rates close to those of HER2-negative, HR-positive breast cancer.

In most Southeast Asian countries, the highest unmet need lies in the lack of a defined treatment plan for the disease, poor affordability, and patients continuing to rely on the use of chemotherapies in the later lines of treatment. It is important for drug companies to consider the evolving reimbursement landscape when determining pricing strategies across the Southeast Asian markets, because this will significantly impact the uptake of premium drugs.

Scope

The current Southeast Asia breast cancer market contains well-established novel targeted products such as Perjeta and Kadcyła, tyrosine kinase inhibitors such as Tykerb, and CDK inhibitors such as Ibrance.

- Which drugs are used as the standard treatment in each setting of the disease?
- What are the competitive advantages of the existing novel drugs?
- Do branded therapies show continued growth, and how does their expected uptake influence the market growth over the forecast period?

There are about 1,150 active pipeline molecules. The pipeline contains a range of molecule types and molecular targets, including those that are well established in breast cancer, and novel, first-in-class therapies.

- Which molecular targets appear most frequently in the pipeline?
- There is currently no approved therapy in the TNBC setting. Are there any drugs in the pipeline to improve treatment for TNBC?
- Targets that are not currently represented by marketed products are virtually absent from the late-stage pipeline. Does the early stage pipeline have experimental molecules designed to target novel pathways?

Analysis of clinical trials since 2006 identified that the failure rates of breast cancer molecules were highest in Phase II, at 59%, with the overall attrition rate for breast cancer standing at 85%.

- How do failure rates vary by stage of development, molecule type, and molecular target?
- How do other factors, such as average trial duration and trial size, influence the costs and risks associated with product development?

The breast cancer Southeast Asian market will be valued at \$2.7 billion in 2022, growing from \$942.3m in 2015 at a CAGR of 16.2%.

- Despite an array of treatments being available for breast cancer, there is still an unmet need in the Southeast Asian markets related to low uptake of targeted therapies. Will this scenario change during the forecast period?

Market forecasts indicate that South Korea will continue to be the largest market in Southeast Asia, due to the emergence of novel therapies and the continued uptake of branded therapies.

- How will the annual cost of therapy and market size vary between the eight Southeast Asian markets?
- What are the factors that contribute to the increase in ACoT and market size for each of the assessed countries?
- How will branded therapies be affected by upcoming pipeline therapies in each of the assessed countries?
- How will the potential launch of biosimilars influence each country?
- Will the launch of biosimilars or emerging pipeline molecules threaten the commercial success of existing drugs?

Various drivers and barriers will influence the market over the forecast period.

- What barriers limit the uptake of premium-priced therapeutics in the assessed countries?
- What factors are most likely to drive the market in these countries?

## 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, including a clinical comparison of marketed therapies.
- Visualize the composition of the breast cancer market in terms of dominant therapies, with their clinical and commercial standing. Unmet needs are also highlighted to allow a competitive understanding of gaps in the market.
- Analyze the breast cancer pipeline and stratify pipeline therapies by stage of development, molecule type and molecular target.
- Understand the potential of late-stage therapies, with extensive profiles of products that could enter

the market over the forecast period, highlighting clinical performance, potential commercial positioning, and how they will compete with other therapies.

- Predict breast cancer market growth in the eight Southeast Asian markets, with epidemiological and annual cost of therapy forecasts, as well as analysis of the contributions of promising late-stage molecules to market growth.

- Identify commercial opportunities in the breast cancer deals landscape by analyzing trends in licensing and co-development deals.

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