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Multiple label expansions of premium-priced agents and the launch of four novel therapies will fuel the significant growth of the multiple myeloma market over the ten-year forecast period. The generic erosion expected for lenalidomide, the patient share and sales leader of 2015 in the multiple myeloma space, as well as the generic erosion of bortezomib, pomalidomide and thalidomide will temper the overall growth of this market. Untapped clinical and commercial potential remains in multiple myeloma for therapies with improved efficacy and for agents positioned in patient segments that are currently underserved. Questions Answered: The multiple myeloma market will experience robust growth through 2025. What factors are driving this growth? Which lines of treatment will experience the most growth? Which drug class will dominate the treatment of multiple myeloma? What new classes of agents will emerge over the ten-year forecast period, and what will be their market impact? Cell-surface targeted agents such as daratumumab (Janssen’s Darzalex) and elotuzumab (Bristol-Myers Squibb/AbbVie’s Empliciti) have changed the multiple myeloma treatment algorithm since their recent approval. What is this drug class sales potential in the multiple myeloma market during our forecast period? What are thought leaders’ opinion of cell-surface targeted agents in general? Lenalidomide (Celgene’s Revlimid) and bortezomib (Janssen/Takeda Pharmaceutical’s Velcade) are widely used across all multiple myeloma drug-treated populations and garner significant sales. How will market share for lenalidomide and bortezomib change over our ten-year forecast period as a result of a generic erosion? What market events will impact sales of these agents? We forecast the launch of two new drug classes, the immune checkpoint inhibitors and apoptosis-inducing agents, for multiple myeloma. How do physicians anticipate using these agents? How will the entry of these agents impact the use of other therapies in the multiple myeloma market? Scope: Markets covered: United States, France, Germany, Italy, Spain, United Kingdom, and Japan. Primary research: 22 country-specific interviews with leading hematological oncologists and survey data from 30 physicians in each of the major markets who treat at least 68 multiple myeloma patients per year. Epidemiology: Diagnosed incident cases of multiple myeloma, diagnosed incident cases of monoclonal gammopathy of undetermined significance (MGUS). Population segments in market forecast: Drug-treatable patients with symptomatic myeloma including first- (transplant-eligible and transplant-ineligible), second-, third-, and fourth-line segments. Emerging therapies: Phase I and II: 28 drugs; Phase III: 5 drugs; preregistration: 1 drug; registered: 0 drugs.

Report Details

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