****Published May 2017***

MarketVIEW: CAR-T r/r B-ALL global market forecast (CAT: IOMV074)

Product Name	:	**MarketVIEW: CAR-T r/r B-ALL commercial market forecast**
Description	:	Commercial assessment of new CAR-T therapies in relapsed/refractory B-acute lymphoblastic leukaemia
Contents	:	Executive presentation [130 slides] + 1 MS Excel workbook
Therapeutic Area	:	Cancer immunotherapy
Publication date	:	May 2017
Catalogue No	:	IOMV074

Background

B-ALL Acute Lymphoblastic Leukaemia (ALL) is a hematologic malignancy characterised by the proliferation and accumulation of lymphoid progenitor cells (lymphoblasts) or lymphocytes in the bone marrow, blood or in various extramedullary sites. ALL, which mainly affects the <20 yrs age group represents about 0.4% of all new cancer cases in the US with around 6500 new cases per year and ~1400 deaths (SEER, Cancer Stat Facts). Rates for ALL have been rising ~0.6% each year for the last 10 years although the 5-year survival rate shows an increasing trend.

Despite a plethora of treatment strategies and a relatively high cure rate in children (60-90%), the prognosis of those individuals with relapsing/refractory disease (r/r) is still poor. In adults, long term survival (5 year rates) are often below 10%. No current standard approach exists. **CAR-T** or Chimeric Antigen Receptor T cells are a promising new treatment intervention for r/r B-ALL with companies such as Novartis, Pfizer (Cellectis), Medimmune, Juno Therapeutics, and Kite Pharma involved in clinical studies. Recently, Novartis has received a FDA priority review for **CTL019 (tisagenlecleucel-T)** upon BLA filing for pediatric and young adult patients for r/r B-cell ALL.

This **MarketVIEW** product consists of a detailed Executive presentation (~130 slides) and MS-Excel workbook forecasting the commercial potential ($ 000s) of novel CAR-T therapies (per competitor) in both pediatric and adult r/r B-ALL(new cases) across 9 major Western[1] markets to 2030. A patient-based flow methodology has been devised where **three possible intervention scenarios** for CAR-T introduction are visualized so that the optimum product positioning can be assessed. In addition, an up-to-date review of B-ALL disease background, epidemiology, current and future treatments is presented along with a comprehensive review of the CAR-T landscape. Pricing and cost effectiveness considerations are also discussed. All assumptions are clearly provided.

[1] US, Canada, UK, France, Germany, Italy, Spain, UK, Australia and Japan

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Methodology

iOnco Analytics has closely monitored all significant source material pertaining to B-ALL and CAR-T therapies as approaches to cancer immunotherapy. Source materials used are literature articles, government websites, medical bodies and associations, conference proceedings etc.

PRODUCT CONTENTS:

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****This product is composed of one Excel workbook[2] and an executive presentation[3]

Contents

[2] Contents available on request
[2] Presentation titles may apply to more than one slide

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Continued……

Clinical presentation and diagnosis of ALL
Diagnosis of ALL
Methods of classification of ALL
ALL classification subtypes
Factors affecting the prognosis of ALL
Factors affecting the prognosis of ALL (cont..)
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Treatment of relapsed/refractory (r/r) ALL [2 slides]
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The unmet need in ALL treatment – pediatric
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Model caveats and limitations
Model validations
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About **iOnco Analytics**
Disclaimer
Slide number ~130

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TERMS and CONDITIONS:

iOnco Analytics – a trading division of **Assay Advantage (VacZine Analytics)** Ltd UK Company Number: 5807728 (Herein referred to as "The Company"). (Herein [enter client name] to as "The Client").

1. This finished research product is provided is provided as a Service. Any additional Service required by the client will be subject to a new proposal being prepared.

2. The Service will commence after written (e-mail) or Fax confirmation stating the Client's acceptance of the Service according the description proposed by the Company.

3. Cancellation policy. The Company's cancellation policies are in accordance with the EU Consumer Protection (Distance Selling) Regulations 2000 (DSRs). Prior to acceptance of an order the Company will make available written information regarding Clients cancellation rights. This is posted on the Company website and is available for public review.

4. Cancellation rights: For finished documents - a Clients cancellation rights will last for **seven working days** counting from the day that the order was concluded. If the Services i.e. provision of the documents has taken place with the Clients agreement before this period the Client's cancellation rights have ended.

5. Invoicing will **100%** after submission of deliverables to the Client in a form reasonably acceptable to the Client.

6. If not purchased on line invoices are payable within **thirty days** of the invoice date.

7. All proposals are quoted in **$USD dollars or £GBP** and invoices are to be settled in the same currency.

8. The Company agrees not to disclose to any third party confidential information acquired in the course of providing the services listed without the prior written consent of the Client. Exception occurs when the information is already in the public domain or when disclosure is necessary to help the Company's employees and agents with the performance of the Company's obligations to achieve satisfactory completion of the project and approved in writing by the Client.

9. Force Majeure: The Company will not be liable for any delay or failure to perform any obligation under this Agreement insofar as the performance of such obligation is prevented by an event beyond our reasonable control, included by not limited to, earthquake, fire, flood or any other natural disaster, labour dispute, riot, revolution, terrorism, acts of restraint of government or regulatory authorities, failure of computer equipment and failure or delay of sources from which data is obtained.

10. Please also refer to Master **TERMS and CONDITIONS** available upon request.

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About iOnco Analytics:

iOnco Analytics is a subdivision of **VacZine Analytics** a world leading supplier of vaccine market analyses.

iOnco Analytics will provide a new suite of commercial analysis products focused on cancer immunotherapy.

Our role is to define market potential and strategy of new interventions in this space.

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