

\*\*\*\*Published August 2017\*\*\*\*

## MarketVIEW: CAR-T r/r B-cell NHL global market forecast (CAT: IOMV075)

<b>Product Name</b>	:	<b>MarketVIEW: CAR-T r/r B-cell Non-Hodgkin Lymphoma commercial market forecast</b>
<b>Description</b>	:	Commercial assessment of new CAR-T therapies in relapsed/refractory Non-Hodgkin Lymphomas (B-cell types) <sup>1</sup>
<b>Contents</b>	:	Executive presentation [177 slides] + 1 MS Excel workbook
<b>Therapeutic Area</b>	:	Cancer immunotherapy
<b>Publication date</b>	:	August 2017
<b>Catalogue No</b>	:	IOMV075

### Background

**Non-Hodgkin Lymphomas (NHLs)** are a heterogeneous group of malignancies which have a wide range of histological appearances and clinical features. They are divided into two prognostic groups: Indolent lymphomas and Aggressive lymphomas. Of the B-cell type aggressive forms, Diffuse large B-cell lymphoma (DLBCL) and Follicular lymphoma (FL) are common types accounting for around 65% of cases (WHO figures). DLBCL is most common in people over 50 and has a current 5-year survival rate around 62%. It is estimated that approximately 26,000 people will be diagnosed with DLBCL in the United States in 2016.

There are many treatment strategies for NHLs including radiation therapy, chemotherapy (e.g. CHOP, CVP) and various combinations with rituximab or other anti-CD20 mAbs. Stem cell or bone marrow transplant is an also option for certain patients. There is a high unmet need within the relapsing/refractory subset of patients who have an extremely poor prognosis.

New treatments for NHL under investigation include the checkpoint inhibitors (PD-1 and PD-L1), therapeutic vaccines (CDX-301, SD101) and CAR-T cell therapies: **Axi-Cel/KTE-C19**, **JCAR017** and **CTL019 (tisagenlecleucel-T)** developed by Kite Pharma, Juno Therapeutics and Novartis Pharmaceuticals respectively. Kite's KTE-C19 has already been filed in the US for DLBCL with Novartis and Juno expected to follow closely in both US and the EU.

This **MarketVIEW** product consists of a detailed Executive presentation (~177 slides) and MS-Excel workbook forecasting the commercial potential (\$ 000s) of novel CAR-T therapies (per competitor) in adult r/r NHL B-cell type lymphomas (new cases) across 9 major Western<sup>2</sup> markets to 2030. A patient-based flow methodology has been devised where **two possible intervention scenarios** for CAR-T introduction are visualised so that the optimum product positioning can be assessed. In addition, an up-to-date review of NHL disease background, epidemiology, current and future treatments is presented along with a comprehensive review of the CAR-T NHL competitive landscape. Pricing, cost effectiveness, manufacturing and logistical considerations are also discussed. All assumptions are clearly provided.

<sup>1</sup> Indolent and Aggressive types including Diffuse Large B cell Lymphoma (DLBCL)

<sup>2</sup> US, Canada, UK, France, Germany, Italy, Spain, UK, Australia and Japan

## Methodology

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

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\*\*\*\*This product is composed of [one Excel workbook<sup>3</sup>](#) and [an Executive Presentation<sup>4</sup>](#)

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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.
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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.
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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.
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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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