

****Published February 2018****

MarketVIEW: CAR-T B-ALL, NHL (DLBCL) & CLL global forecast (CAT: IOMV078)

Product Name	:	MarketVIEW: CAR-T B-ALL, NHL (DLBCL) & CLL global forecast
Description	:	Commercial assessment of new CAR-T therapies per main indication
Contents	:	Executive presentation [~55 slides, .pdf only]
Therapeutic Area	:	Cancer immunotherapy
Publication date	:	February 2018
Catalogue No	:	IOMV078

Background

CAR-T therapy is a specialized autologous technology whereby a patient's own T-cells are transfected with an engineered chimeric antigen receptor (CAR) and then re-introduced to the body to fight cancer. The technology, first described in 1989, enables a CAR-T lymphocyte to have antigen specificity to a variety of targets e.g. including proteins, carbohydrates and glycolipids but also incorporates a T-cell signaling mechanism to allow for T-cell activation and a cytotoxic response. CAR-T cell immunotherapy has recently been named "Advance of the Year" in the Annual ASCO report, 2017.

CD19 targeted CAR-T therapies such as Novartis' **Kymriah™ (tisagenlecleucel)** and Gilead/Kite's **Yescarta™ (axicabtagene ciloleucel)** were both first FDA approved in 2017 for relapsing/recurring forms of pediatric acute lymphoblastic lymphoma (B-ALL) and Diffuse Large B-cell lymphoma (DLBCL), a common type of non-Hodgkin lymphoma (NHL), respectively. Further submissions in the EU and Rest of World regions are either submitted or planned for 2018 and beyond. The emergence of new CAR-T cell therapies as a market segment has so far driven considerable company acquisitive activity (Gilead/Kite, Celgene/ Juno Therapeutics) and with further technologies (BCMA) and target indications (MM, CLL, FL) planned, we expect substantial market development over the next few years.

This **MarketVIEW forecast summary product** consists of a detailed Executive presentation (~55 slides, .pdf) which summarizes the commercial potential (\$ 000s) of novel CAR-T therapies in r/r B-ALL, NHL (DLBCL) and CLL across 9 major Western¹ markets to 2030 in all relevant age groups. The summary outputs are derived from models² which incorporate a proprietary patient-based flow methodology which include **possible intervention scenarios** for CAR-T introduction. In this summary slide deck, graphical/tabular outputs of these models are provided with all main assumptions. An Executive Summary for each indication is also included.

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

² Note this is a summary presentation, actual MS Excel forecast models are available separately

Methodology

iOnco Analytics has closely monitored all significant source material pertaining to B-ALL, NHL (DLBCL) and CLL 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 Executive Presentation \(.pdf\)](#)³

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³ Presentation titles may apply to more than one slide

Continued.....

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Bibliography

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