

## Stakeholder Insight: Renal Cancer - Targeted therapies rapidly take hold of market

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### Description

#### Introduction

In the 7 major markets, Datamonitor estimates that the incidence of RCC in 2007 will total 86,800 cases. Around 25% of all RCC patients are diagnosed with Stage IV disease; the 2-year survival rate for these patients is around 23%. This low survival rate and the fact that a significant proportion of Stage III patients relapse with Stage IV disease mean there is significant unmet need in RCC.

#### Scope

Analysis of RCC market based on a survey of 180 renal cancer specialists, supported by interviews carried out with key opinion leaders  
Segmentation of renal cancer patient population by disease subtype, disease stage at presentation and proportion receiving surgery and/or drug therapy  
In-depth analysis of treatment patterns in RCC by line of therapy, including most commonly prescribed drug regimens in 7 major markets  
Ranking of key prescribing influences in RCC, brand assessment of existing drug therapies, unmet needs and late-phase pipeline overview

#### Highlights

Pfizer's Sutent (sunitinib) is established as the standard-of-care for the first-line treatment of Stage IV RCC in most of the 7 major pharmaceutical markets. Bayer/Onyx's Nexavar (sorafenib) is the most commonly prescribed therapy in the second-line for Sutent-refractory patients. Wyeth's Torisel (temsirolimus) will soon be used in some poor-prognosis patients in the first-line and Genentech/Roche's Avastin (bevacizumab) may capture some of Sutent's first-line market share. Both drugs are also likely to compete for a share of the second-line market in Sutent-refractory patients. Due to high levels of unmet need in renal cancer, there is considerable activity in the late-phase renal cancer pipeline, with 9 drugs in Phase III development including 4 immunotherapies and 5 targeted therapies. The most promising drugs are Novartis's Certican (everolimus) and GlaxoSmithKline's pazopanib.

#### Reasons to Purchase

Identify key prescribing factors that influence prescription patterns for systemic therapy in renal cancer  
Examine the significant unmet need within renal cancer and identify opportunities for new product development  
Enhance commercial positioning by increasing understanding of current dynamics within the renal cancer market

### Table of Contents

ABOUT DATAMONITOR HEALTHCARE	2
About the Oncology pharmaceutical analysis team	2
Andrew Paramore - Oncology Lead Analyst & Head of Product Development	2
CHAPTER 1 EXECUTIVE SUMMARY	3
Scope of the analysis	3
Datamonitor insight into the Renal Cancer market	4
Related reports	5
Upcoming reports	5
CHAPTER 2 INTRODUCTION AND SCOPE	7
Coverage of the Stakeholder Insight survey	7
Disease definition and epidemiology	7
Segmentation of the renal cancer population	7
Current drug treatment practice for renal cancer	7
Key unmet needs within the renal cancer market	7

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Potential of pipeline drugs for renal cancer	8
CHAPTER 3 COUNTRY TREATMENT TREES	9
Introduction	9
US	11
Japan	13
France	15
Germany	17
Italy	19
Spain	21
UK	23
CHAPTER 4 DISEASE OVERVIEW, EPIDEMIOLOGY AND PATIENT SEGMENTATION	25
Disease definition	25
TNM is most commonly used staging system for RCC	26
Etiology	28
Obesity accounts for 30% of RCC incidences	28
Smoking accounts for 20% of RCC incidences	28
Hypertension influences RCC risk	28
Family history of RCC associated with an increased risk for RCC	28
No conclusive evidence over occupational risk factors	29
Disease incidence	29
RCC incidence rates vary considerably across the seven major markets; RCC is more prevalent in males	29
RCC incidence rate increasing steadily	30
Incidence of RCC across seven major markets will total 86,800 in 2007	30
CHAPTER 5 DIAGNOSIS AND PRESENTATION IN RCC	33
Disease subtype at presentation	33
Renal cell carcinoma accounts for the majority of kidney cancer diagnoses across the seven major markets	33
Distribution of kidney cancer subtypes does not vary significantly across the seven major markets	34
Disease stage at presentation	36
High proportion of RCC patients treated by medical oncologists present with Stage IV disease	37
Higher apparent proportion of Stage IV RCC patients at diagnosis in Germany may reflect difference in referral patterns	38
Urologists rather than medical oncologists primarily responsible for RCC management in Japan; explains apparently higher proportion of early-stage disease in Japan	38
Uncertain whether screening program would significantly increase proportion of RCC diagnosed at early stage	39
CHAPTER 6 TREATMENT OPTIONS FOR RCC	40
Overview of treatment options in RCC	40
Overview of pharmacological therapies in RCC: targeted therapy approvals provide much-needed therapeutic option in RCC	40
Overview of surgery in RCC: surgery is principal treatment option for Stage I-III RCC	43
Trends in surgery and drug therapy in RCC across the seven major markets	45
High percentage of Stage I-III RCC patients receive surgery across all seven major markets	45
Adjuvant therapy in Stage I-III patients limited to clinical trials	47
Small proportion of non-surgically treated patients treated with drug therapy	51
Majority of Stage IV patients receive drug therapy	52
CHAPTER 7 TREATMENT TRENDS: FIRST-LINE DRUG REGIMENS FOR STAGE IV RCC	55
First-line prescribing trends in Stage IV RCC by class of drug therapy	55
Use of targeted therapies across seven major markets for Stage IV RCC reflects country-specific market dynamics	55
US: targeted therapies have already captured a large share of the market	56
Japan: cytokine therapy dominates RCC market in absence of approved targeted therapies	56
France: use of targeted therapies for RCC is highest compared to other major European healthcare markets	57
Italy and UK: cost-containment measures limit uptake of targeted therapies for RCC	57
Use of cytotoxic therapy in the first-line is highest in Germany	58
First-line prescribing trends in Stage IV RCC by specific drug or regimen	59
Sutent versus Nexavar: Sutent is most commonly prescribed first-line targeted therapy for RCC	67
Interferon alfa versus interleukin: interferon alfa is the most commonly prescribed cytokine therapy for first-line treatment of RCC	69
Avastin used off-label in the US for Stage IV RCC; likely to capture more of first-line market	71
Torisel may experience modest uptake for low performance status RCC patients	72
CHAPTER 8 TREATMENT TRENDS: SECOND-LINE AND THIRD-LINE DRUG REGIMENS IN RCC	74
Recurrence patterns and second-line treatment in RCC	74
Recurrence rates increase with disease stage at diagnosis	74
High proportion of Stage III and Stage IV RCC patients progress to receive a second-line drug regimen	77
Second-line prescribing trends in RCC by class of drug therapy	83
Targeted therapies are predominant class of second-line drug therapy for RCC	83
Second-line prescribing trends in RCC by specific drug or regimen	85
Nexavar and Sutent are the predominant drug therapies in second-line RCC treatment	96
Nexavar is preferred second-line therapy for Sutent-refractory patients	96
Nexavar marginally preferred over Sutent as second-line therapy in patients treated with interferon alfa or interleukin-2 as first-line therapy	97
Second-line use of interleukin-2 mainly accounted for by Japanese RCC patients	98
Avastin third most prescribed second-line drug in US, France, Germany and Spain	98
Gemzar is third most popular second-line therapy in Italy	99
Torisel likely to capture a share of second-line market in RCC	99
Third-line prescribing trends in RCC	99
Less than a third of second-line RCC patients progress to a third-line regimen	99
Third-line prescribing trends by specific drug or regimen	101
Avastin most prescribed third-line RCC therapy across the seven major markets	109
5-fluorouracil is favored third-line drug in Japan	110
CHAPTER 9 PRESCRIBING INFLUENCES AND BRAND ASSESSMENT FOR RCC DRUG THERAPIES	111
Factors influencing prescribing decisions in RCC	111

Efficacy is the major prescribing influence in RCC	112
Toxicity also an important prescribing influence	113
Cost issues possibly not as important as for other indications	113
Other factors exert minor influence on RCC treatment decisions	113
Physician perception of existing therapies in RCC	114
Efficacy considered to be greatest for Sutent	115
Toxicity profiles most favorable for Sutent, Nexavar and Avastin	117
Cost: interferon alfa considered best in terms of cost issues	119
Convenience of administration highest for Sutent and Nexavar due to oral availability	122
Patient preference reflects toxicity profile	122
Physician familiarity highest for interleukin-2 and interferon alfa	122
Brand map overview of attributes and drug perception in RCC	122
Interpreting a brand map	122
CHAPTER 10 TREATMENT OUTCOMES AND UNMET NEEDS IN RCC	125
Treatment outcomes	125
Remission rates	125
Remission duration	126
Unmet needs in renal cancer	128
Efficacious drugs for metastatic disease is greatest unmet need in RCC	129
Improving treatment outcomes in RCC	130
Drug combinations likely to become more common in RCC	130
Sutent and Nexavar being investigated in adjuvant setting	130
CHAPTER 11 RCC LATE-PHASE PIPELINE OVERVIEW	132
Desired attributes of pipeline drugs in RCC	132
Products in Phase III development for RCC	134
RCC Phase III pipeline overview	134
Oncophage (vitespen), Antigenics	135
Reniale, LipoNova	136
TroVax (MVA 5T4), Oxford Biomedica/Sanofi Aventis	137
Avastin (bevacizumab), Genentech/Roche	138
Certican (everolimus), Novartis	139
Rencarex (WX-G250), Willex	140
Tykerb (lapatinib), GlaxoSmithKline	141
Pazopanib, GlaxoSmithKline	142
BIBLIOGRAPHY	144
Journals	144
Websites	150
Other	152
APPENDIX A	154
Physician research methodology	154
Physician sample breakdown	154
US	154
Japan	155
France	155
Germany	156
Italy	156
Spain	157
UK	157
Contributing experts	158
APPENDIX B	159
The survey questionnaire	159
Section 2 - Treatment	165
Section 3 - Product Profiles	176
Section 4 - Pipeline Products	178
The opinion leader discussion guide	180
Referral and treatment in RCC	180
First-line drug therapy in RCC	181
Second-line drug therapy in RCC	181
Unmet needs, pipeline drugs and future treatments	182
Disclaimer	183
List of Tables	
Table 1: TNM staging of RCC and associated 5-year survival rates	27
Table 2: Incidence rates of kidney cancer across the seven major markets, 2002	29
Table 3: Estimated RCC incidence across the seven major markets, 2007-17	31
Table 4: Breakdown of renal cancer subtypes at presentation for each of the seven major markets (%), 2007	35
Table 5: Percentage of RCC patients presenting with each stage of disease at first diagnosis in the seven major markets (%), 2007	36
Table 6: Summary of RCC drug regimens, July 2007	41
Table 7: Unapproved drug therapies for RCC used by physicians responding to Datamonitor renal cancer survey, 2007	43
Table 8: Principal surgical options for the treatment of RCC, 2007	44
Table 9: Percentage of Stage I-III RCC patients receiving surgery/not receiving surgery averaged across the seven major markets, 2007	45
Table 10: Percentage of Stage I RCC patients undergoing surgery who also receive adjuvant and/or neoadjuvant drug therapy in the seven major markets, 2007	48
Table 11: Percentage of Stage II RCC patients undergoing surgery who also receive adjuvant and/or neoadjuvant drug therapy in the seven major markets, 2007	49
Table 12: Percentage of Stage III RCC patients undergoing surgery who also receive adjuvant and/or neoadjuvant drug therapy in the seven major markets, 2007	50

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- Table 13: Percentage of non-surgically treated Stage I-III RCC patients receiving drug therapy in the seven major markets, 2007 51
- Table 14: Percentage of Stage IV RCC patients receiving drug therapy in the seven major markets, 2007 53
- Table 15: Percentage of Stage IV RCC patients who undergo first-line systemic therapy with each drug class in the seven major markets, 2007 55
- Table 16: Percentage of Stage IV RCC patients who undergo first-line systemic therapy receiving each drug or regimen, in the seven major markets, 2007 60
- Table 17: Percentage of RCC patients relapsing at each stage averaged over the seven major markets, 2007 74
- Table 18: Disease stage at relapse for RCC patients who initially present with Stage I-III RCC averaged across the seven major markets (%), 2007 76
- Table 19: Percentage of RCC patients initially treated with drug therapy who progress/do not progress to a second-line drug regimen averaged across the seven major markets, 2007 78
- Table 20: Percentage of Stage III RCC patients initially treated with drug therapy who progress/do not progress to receive a second-line drug regimen in each of the seven major markets, 2007 80
- Table 21: Percentage of Stage IV RCC patients initially treated with drug therapy who progress/do not progress to receive a second-line drug regimen in each of the seven major markets, 2007 82
- Table 22: Percentage of RCC patients who receive second-line drug treatment with each class of drug, averaged across the seven major markets, 2007 84
- Table 23: Percentage of RCC patients who undergo second-line drug therapy receiving each drug or regimen as a second-line treatment, in the seven major markets, 2007 86
- Table 24: Percentage of patients who receive each drug as second-line therapy according to treatment initially received, averaged across the seven major markets, 2007 94
- Table 25: Comparison of clinical trial data for Sutent and Nexavar in cytokine-refractory patients, 2007 98
- Table 26: Percentage of second-line RCC patients progressing to third-line regimen in the seven major markets, 2007 100
- Table 27: Percentage of RCC patients who undergo third-line drug therapy receiving each drug or regimen, in the seven major markets, 2007 102
- Table 28: Relative weighting given to each prescribing influence for RCC drug therapy across the seven major markets, 2007 111
- Table 29: Mean rating (weighted by importance of attribute) given by physicians to currently approved drugs in RCC, 2007 114
- Table 30: Comparison of Phase III trial data for Sutent, Nexavar and Torisel in RCC 116
- Table 31: Summary of selected clinical trials of interferon alfa and interleukin-2 117
- Table 32: Toxicity profile comparison: most commonly reported Grade 3 or 4 adverse events in large-scale clinical trials of RCC drugs, 2007 119
- Table 33: Comparison of estimated costs for drug treatments in RCC, 2007 121
- Table 34: Mean percentage of RCC patients achieving remission by disease stage in the seven major markets, 2007 125
- Table 35: Mean duration of remission (in months) for RCC patients achieving remission before relapsing in the seven major markets, 2007 127
- Table 36: Ongoing Phase III trials of targeted therapies as adjuvant treatment following surgery in RCC, July 2007 131
- Table 37: Drugs in Phase III development for RCC, August 2007 135
- Table 38: US physician sample breakdown, 2007 154
- Table 39: Japan physician sample breakdown, 2007 155
- Table 40: France physician sample breakdown, 2007 155
- Table 41: Germany physician sample breakdown, 2007 156
- Table 42: Italy physician sample breakdown, 2007 156
- Table 43: Spain physician sample breakdown, 2007 157
- Table 44: UK physician sample breakdown, 2007 157
- List of Figures
- Figure 1: Population, treatment and treatment outcome data for RCC in the US, 2007 11
- Figure 2: Population, treatment and treatment outcome data for RCC in US, 2007 (continued) 12
- Figure 3: Population, treatment and treatment outcome data for RCC in Japan, 2007 13
- Figure 4: Population, treatment and treatment outcome data for RCC in Japan, 2007 (continued) 14
- Figure 5: Population, treatment and treatment outcome data for RCC in France, 2007 15
- Figure 6: Population, treatment and treatment outcome data for RCC in France, 2007 (continued) 16
- Figure 7: Population, treatment and treatment outcome data for RCC in Germany, 2007 17
- Figure 8: Population, treatment and treatment outcome data for RCC in Germany, 2007 (continued) 18
- Figure 9: Population, treatment and treatment outcome data for RCC in Italy, 2007 19
- Figure 10: Population, treatment and treatment outcome data for RCC in Italy, 2007 (continued) 20
- Figure 11: Population, treatment and treatment outcome data for RCC in Spain, 2007 21
- Figure 12: Population, treatment and treatment outcome data for RCC in Spain, 2007 (continued) 22
- Figure 13: Population, treatment and treatment outcome data for RCC in the UK, 2007 23
- Figure 14: Population, treatment and treatment outcome data for RCC in the UK, 2007 (continued) 24
- Figure 15: Relative prevalence of RCC subtypes, 2005 26
- Figure 16: Estimated RCC incidence across the seven major markets, 2007-17 32
- Figure 17: Breakdown of kidney cancer subtype at diagnosis averaged over the seven major markets, 2007 34
- Figure 18: Breakdown of renal cancer subtypes at presentation for each of the seven major markets (%), 2007 35
- Figure 19: Percentage of RCC patients presenting with each stage of disease at first diagnosis in the seven major markets, 2007 37
- Figure 20: Timeline of recent approvals of targeted therapies for metastatic RCC, December 2005-May 2007 42
- Figure 21: Percentage of Stage I-III RCC patients receiving surgery/not receiving surgery averaged across the seven major markets, 2007 46
- Figure 22: Percentage of Stage I-III RCC patients not receiving surgery in each country across the seven major markets, 2007 47
- Figure 23: Percentage of non-surgically treated Stage I-III RCC patients who receive drug therapy, seven major markets, 2007 52
- Figure 24: Percentage of Stage IV RCC patients receiving drug therapy, in the seven major markets, 2007 54
- Figure 25: Percentage of Stage IV RCC patients who undergo first-line systemic therapy with each drug class, in the seven major markets, 2007 56
- Figure 26: Top three first-line drug therapies for Stage IV RCC, US, 2007 61
- Figure 27: Top three first-line drug therapies for Stage IV RCC, Japan, 2007 62
- Figure 28: Top three first-line drug therapies for Stage IV RCC, France, 2007 63
- Figure 29: Top three first-line drug therapies for Stage IV RCC, Germany, 2007 64
- Figure 30: Top three first-line drug therapies for Stage IV RCC, Italy, 2007 65
- Figure 31: Top three first-line drug therapies for Stage IV RCC, Spain, 2007 66
- Figure 32: Top three first-line drug therapies for Stage IV RCC, UK, 2007 67
- Figure 33: Percentage of RCC patients relapsing at each stage averaged over the seven major markets, 2007 75
- Figure 34: Disease stage at relapse for RCC patients who initially present with Stage I-III RCC averaged across the seven major markets (%), 2007 77
- Figure 35: Percentage of RCC patients initially treated with drug therapy who progress/do not progress to a second-line drug regimen averaged across the seven major markets, 2007 79
- Figure 36: Percentage of Stage III RCC patients initially treated with drug therapy who progress/do not progress to receive a second-line drug regimen in

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each of the seven major markets, 2007 81

Figure 37: Percentage of Stage IV RCC patients initially treated with drug therapy who progress/do not progress to receive a second-line drug regimen in each of the seven major markets, 2007 83

Figure 38: Proportion of RCC patients who receive second-line drug treatment with each class of drug at second-line, averaged across the seven major markets, 2007 85

Figure 39: Top three second-line drug therapies for RCC, US, 2007 87

Figure 40: Top three second-line drug therapies for RCC, Japan, 2007 88

Figure 41: Top three second-line drug therapies for RCC, France, 2007 89

Figure 42: Top three second-line drug therapies for RCC, Germany, 2007 90

Figure 43: Top three second-line drug therapies for RCC, Italy, 2007 91

Figure 44: Top three second-line drug therapies for RCC, Spain, 2007 92

Figure 45: Top three second-line drug therapies for RCC, UK, 2007 93

Figure 46: Correlation between first-line drug regimen and choice of second-line drug regimen in RCC, averaged across the seven major markets, 2007 95

Figure 47: Percentage of second-line RCC patients progressing to third-line regimen in the seven major markets, 2007 100

Figure 48: Top three third-line drug therapies for RCC, US, 2007 103

Figure 49: Top three third-line drug therapies for RCC, Japan, 2007 104

Figure 50: Top three third-line drug therapies for RCC, France, 2007 105

Figure 51: Top three third-line drug therapies for RCC, Germany, 2007 106

Figure 52: Top three third-line drug therapies for RCC, Italy, 2007 107

Figure 53: Top three third-line drug therapies for RCC, Spain, 2007 108

Figure 54: Top three third-line drug therapies for RCC, UK, 2007 109

Figure 55: Relative weighting given to each prescribing influence for RCC drug therapy across the seven major markets, 2007 112

Figure 56: Mean rating (weighted by importance of attribute) given by physicians to existing RCC drugs, 2007 115

Figure 57: Overview brand map of attributes versus brand perception in RCC, 2007 124

Figure 58: Mean percentage of RCC patients achieving remission by disease stage across the seven major markets, 2007 126

Figure 59: Mean duration of remission (in months) for RCC patients achieving remission before relapsing in the seven major markets, 2007 128

Figure 60: Mean physician ratings of unmet needs in renal cancer, 2007 129

Figure 61: Order of importance of desired clinical attributes for pipeline drugs in metastatic RCC, 2007 132

Figure 62: Clinical targets necessary to convince physicians to use pipeline drug instead of Sutent in first-line for RCC, 2007 133

Figure 63: Clinical targets necessary to convince physicians to use pipeline drug in cytokine-refractory patients in RCC, 2007 134

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