

Evaluate Epi Analyzer

CAR-T Market Focus

The CAR-T Market

The CAR-T market has grown exponentially over the past year following the first product approval – Novartis’s Kymriah in ALL – by the FDA.

This triggered a number of key players in the space to make their moves with Gilead first to strike with their acquisition of Kite Pharma and subsequent approval of Kite’s lead CAR-T asset, Yescarta. Celgene were next to enter the fray with their acquisition of Juno Therapeutics before executing a co-development and commercialisation deal for bb2121 with bluebird bio.

These activities have subsequently positioned these companies at the forefront of the CAR-T market, particularly in the blood cancer space which is the main source of the market initial growth, but a burgeoning pipeline of solid tumour-focused clinical trials is also apparent on the horizon.

Blood cancer CAR-T R&D pipeline of Top 5 companies/groups ranked on marketed products*

Organisation/s	Phase I & I/II	Phase II	Phase III	Filed	Approved/Marketed
Novartis	4	5	-	-	2
Gilead	4	2	1	-	1
Celgene/bluebird bio	4	7	1	-	-
Merck/ZIOPHARM Oncology	2	-	-	-	-
Collectis	2	-	-	-	-
TOTAL	16	14	2	0	3

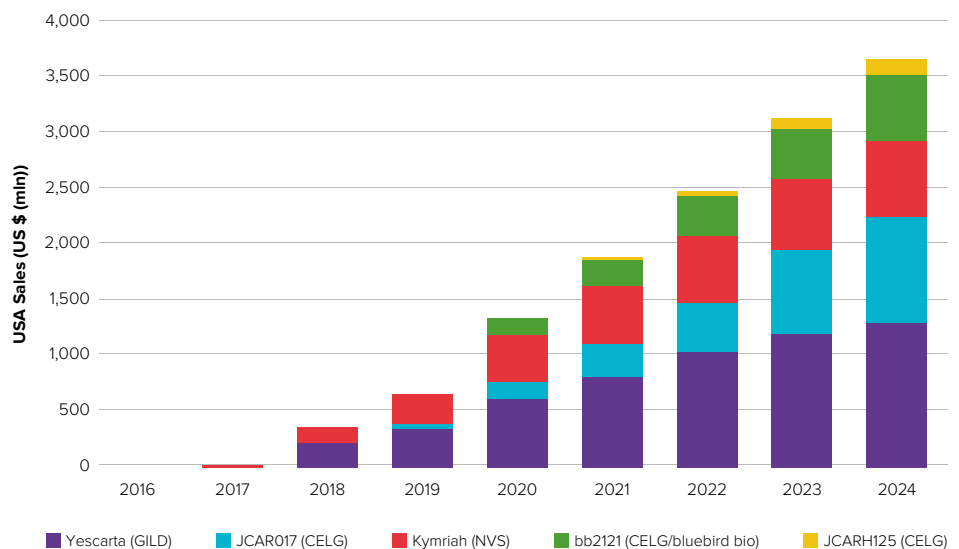
* Note each product/indication has been counted as a unique product

Top 5 product view (USA) in 2024

Evaluate consensus forecast data indicate the top 5 CAR-T products will command just over \$3.5bn in USA sales in 2024, driven primarily by the strong growth of Yescarta, but followed in hot pursuit by Celgene’s JCAR017 and Novartis’s Kymriah.

Non-Hodgkin lymphoma (primarily DLBCL) will command the lion’s share of the sales revenue from the forecast period.

Total US CAR-T Market Value: Top 5 Products in 2024



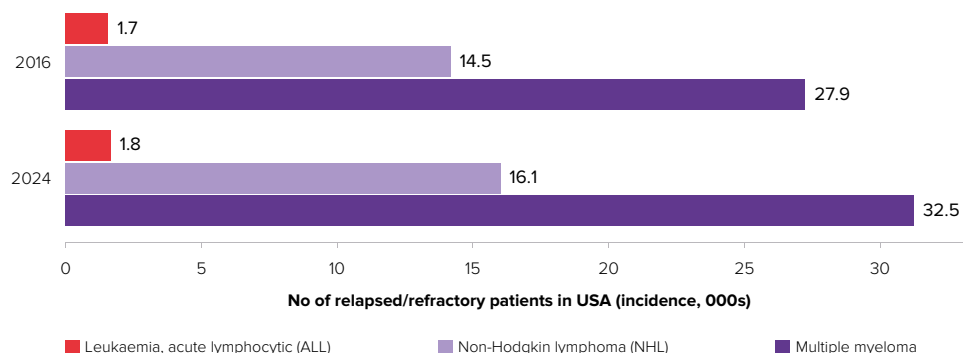
Source: Evaluate Ltd, June 2018

Size of blood cancer patient pool in US

By utilising Evaluate’s Epi Analyzer, the target US incident patient population sizes for the leading CAR-T products are discernible.

Relapsed/refractory multiple myeloma by far affects the largest number of patients, followed by NHL (primarily DLBCL) and ALL.

USA incident patient populations for blood cancer indications targeted by leading CAR-T products





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