



## Content highlights

### Release date

November 2024

Updated throughout the year to reflect Clarivate's expert analysis of the latest major-market events

### Geography

United States, EU5, Japan

### Primary research

19 country-specific interviews with thought-leading medical oncologists

Supported by survey data collected for this and other Clarivate research

### Epidemiology

Incidence of breast cancer by country; drug-treatable / drug-treated cases segmented by hormone receptor (HR) and HER2 status, stage, menopausal status, and line of therapy

### Forecast

10-year, annualized, drug-level sales and patient share of key breast cancer therapies through 2033, segmented by brands / generics / biosimilars and market-relevant drug-treatable populations

### Drug treatments

Coverage of key current and emerging therapies

# Breast Cancer

## Spotlight on Disease Landscape & Forecast

### Market outlook

CDK4/6 inhibitors (Pfizer's Ibrance, Novartis's Kisqali, and Eli Lilly's Verzenio/Verzenios) combined with endocrine therapy are central to the treatment of metastatic HR-positive / HER2-negative disease and are expected to drive robust sales in the early-stage setting as well. Novel biomarker-driven therapies (i.e., Novartis's Piqray, AstraZeneca's Truqap, and Menarini's Orserdu) gained approval recently, and the market is set to become increasingly crowded with agents that seek to overcome endocrine resistance. The treatment of HER2-positive breast cancer is rapidly evolving owing to the approval and forecast label expansions of agents such as Enhertu (Daiichi Sankyo / AstraZeneca), which has emerged as a key therapy for the newly defined HER2-low subgroup. In triple-negative breast cancer, the use of immune checkpoint inhibitors (e.g., Merck & Co.'s Keytruda) is standard, and TROP2-targeted agents (e.g., Gilead's Trodelvy)—currently used in the pretreated metastatic setting—are expected to move to the earlier (and more-lucrative) lines of treatment.

### Questions answered

- How large are the clinically and commercially relevant drug-treatable breast cancer populations?
- What is the expected market impact of recent drug approvals, such as Piqray, Orserdu, Truqap, and Enhertu, on the various subpopulations of breast cancer?
- Which are the most promising agents in the pipeline, and how will they shape the future of this therapy market?
- What key drivers and constraints will affect the breast cancer therapy market over the forecast period?

### Product description

Disease Landscape & Forecast provides comprehensive market intelligence with world-class epidemiology, keen insight into current and emerging therapies, and drug forecasts supported by detailed primary and secondary research.

### Key features

Disease Landscape & Forecast will be updated throughout the year to provide timely insights and analyses as material indication-specific news and events unfold.

Disease Landscape & Forecast features a Drug Pipeline chapter with real-time, global pipeline intelligence content directly from Cortellis. This chapter is updated daily and features interactive figures that can be easily downloaded for detailed analysis or presentations.

## Learn more about Clarivate's full suite of breast cancer solutions:

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