



Sample content

Prostate Cancer

Disease Landscape & Forecast

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About Disease Landscape & Forecast

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.



What are the sizes of the diagnosed, drug-treatable, and/or drug-treated populations?



What is the current treatment landscape?



What products are in development, and what is their launch potential and future positioning?



What is the market outlook of sales and patient share for the next 10 years?



What are the drivers and constraints of market growth, and what events will most impact the market's trajectory?



What unmet needs and opportunities exist?

Methodology and scope

Market forecast

- **Forecast:** Annualized drug-level sales and patient share of key prostate cancer therapies from 2023-2033, segmented by brands/generics.
- **Epidemiology:** Diagnosed and drug-treated incident cases of prostate cancer by country.
- **Market segmentations:** TNM stage, NCCN risk category, and hormone sensitivity.
- **Additional content:** Downloadable Excel files containing detailed forecast assumptions and visual outputs.

Primary market research

- Interviews with 28 thought-leading medical oncologists and urologists across the G7.
- Data and insights leveraged from 211 physician surveys conducted by Clarivate in prostate cancer to model current and future market dynamics.

Geography



United States



EU5



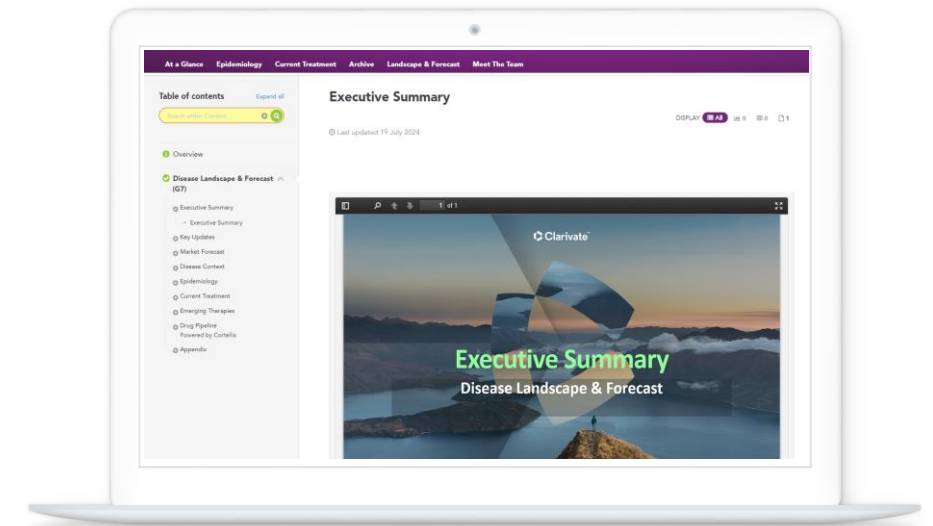
Japan

Key therapies covered

Phase 3	• Opevesostat (Merck) • 177Lu-PNT2002 (Point Biopharma) • 177Lu-DOTA-rosopitamab (Telix) • Saruparib (AstraZeneca)
Marketed	• Enzalutamide (Pfizer) • Apalutamide (J&J) • Darolutamide (Bayer) • Talazoparib (Pfizer) • Pluvicto (Novartis)

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Report format



In-depth written analyses available on Clarivate's Insights Platform or as a PDF download



Succinct **Executive Summary** deck



Market Forecast Assumptions (flat data file providing comprehensive view of the 10-year, annualized, patient-based market forecast assumptions, including a detailed methodology)



Market Forecast Dashboard (interactive tool to help understand, interpret, explore, and visualize key outputs from the market forecast)

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Question answered

What are the expected sales of key drugs used to treat prostate cancer in the G7 markets over the next 10 years?

Forecast data by drug

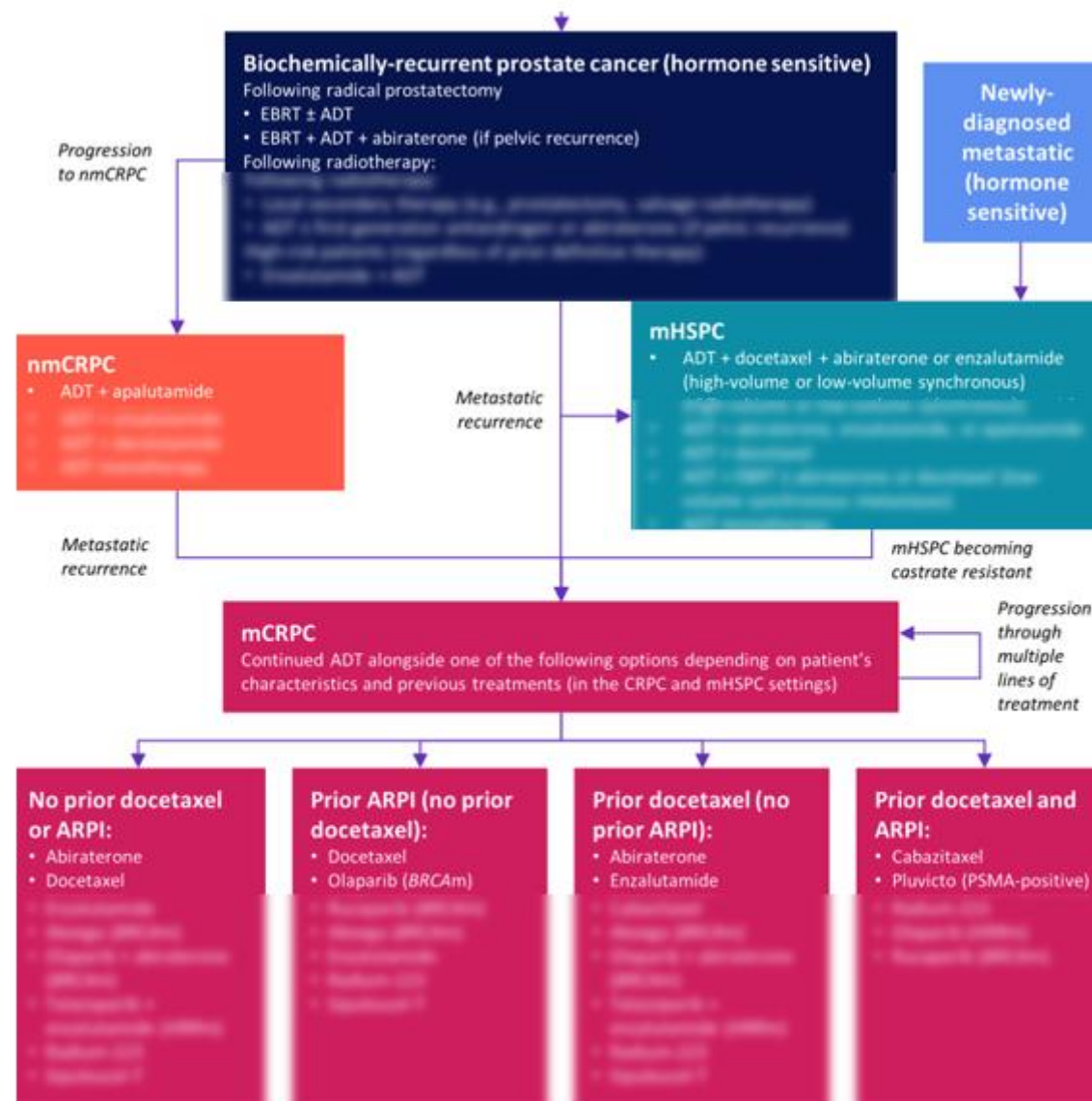
Sales (\$M)

Total Prostate Cancer		2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033
		\$1,011.88	\$1,071.08	\$1,082.75	\$1,098.33	\$1,128.62	\$1,175.41	\$1,234.28	\$1,284.71	\$1,346.33	\$1,408.55	\$1,484.23
Androgen receptor pathway modulators		\$,499,495	\$,599,422	\$,7,027,385	\$,9,761,221	\$6,022,176	\$1,044,955	\$1,752,422	\$2,957,238	\$5,004,485	\$7,000,912	\$9,022,759
Abiraterone	Total	200.00	225.00	244.42	260.12	264.22	225.00	225.00	244.42	260.12	264.22	260.12
Abiraterone	Brand	70.00	80.20	75.00	75.00	72.00	68.00	65.00	65.00	60.00	55.00	45.00
Abiraterone	Generic	230.00	244.80	269.42	285.12	292.22	257.00	260.00	279.42	300.12	309.22	315.12
Enzalutamide	Total	2,040.00	2,026.75	2,045.20	2,040.00	2,040.00	2,040.00	2,040.00	2,040.00	2,040.00	2,040.00	2,040.00
Enzalutamide	Brand	2,040.00	2,026.75	2,045.20	2,040.00	2,040.00	2,040.00	2,040.00	2,040.00	2,040.00	2,040.00	2,040.00
Enzalutamide	Generic	-	-	-	-	-	-	-	-	-	-	-
Apalutamide	Total	1,000.00	1,074.40	1,074.40	1,074.40	1,074.40	1,074.40	1,074.40	1,074.40	1,074.40	1,074.40	1,074.40
Apalutamide	Brand	1,000.00	1,074.40	1,074.40	1,074.40	1,074.40	1,074.40	1,074.40	1,074.40	1,074.40	1,074.40	1,074.40
Apalutamide	Generic	-	-	-	-	-	-	-	-	-	-	-
Darolutamide	Total	625.00	625.00	625.00	625.00	625.00	625.00	625.00	625.00	625.00	625.00	625.00
Darolutamide	Brand	625.00	625.00	625.00	625.00	625.00	625.00	625.00	625.00	625.00	625.00	625.00
Darolutamide	Generic	-	-	-	-	-	-	-	-	-	-	-
Abiraterone ultramicrosize	Total	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00
Abiraterone ultramicrosize	Brand	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00
Abiraterone ultramicrosize	Generic	-	-	-	-	-	-	-	-	-	-	-
Opevesostat	Total	-	-	-	-	-	-	97.22	99.00	236.77	999.00	927.00
Opevesostat	Brand	-	-	-	-	-	-	97.22	99.00	236.77	999.00	927.00
Opevesostat	Generic	-	-	-	-	-	-	-	-	-	-	-
First-generation antiandrogens		\$912.28	\$1,026.75	\$499.00	\$812.00	\$264.00	\$264.75	\$264.00	\$264.00	\$264.00	\$264.00	\$264.00
Bicalutamide	Total	4.00	4.00	4.00	4.22	4.00	4.00	4.00	4.00	4.00	4.00	4.00
Bicalutamide	Brand	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00
Bicalutamide	Generic	-	-	-	-	-	-	-	-	-	-	-
Flutamide	Total	300.00	324.75	324.00	324.00	324.00	324.00	324.00	324.00	324.00	324.00	324.00
Flutamide	Brand	-	-	-	-	-	-	-	-	-	-	-
Flutamide	Generic	300.00	324.75	324.00	324.00	324.00	324.00	324.00	324.00	324.00	324.00	324.00
Nilutamide	Total	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00
Nilutamide	Brand	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00	90.00
Nilutamide	Generic	-	-	-	-	-	-	-	-	-	-	-

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Question answered

What is the current treatment paradigm in prostate cancer?



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Question answered

What are the opinions of clinical thought leaders regarding the development of opevesostat for prostate cancer?

General opinions of opevesostat in prostate cancer

"It's very promising. The data are very clear, showing about 50% PSA responses in mutant patients; however, responses in nonmutated patients were much lower, less than 20%. My prediction is that it's going to become approved but only in mutation-positive patients." —Medical oncologist, United States

"Targeting patients with mutations in the androgen receptors is a great strategy, and if this therapy is successful, it could play an important role in the treatment of prostate cancer. To me, this is the most interesting approach that's being investigated in Phase 3 studies for prostate cancer at the moment." —Medical oncologist, Spain

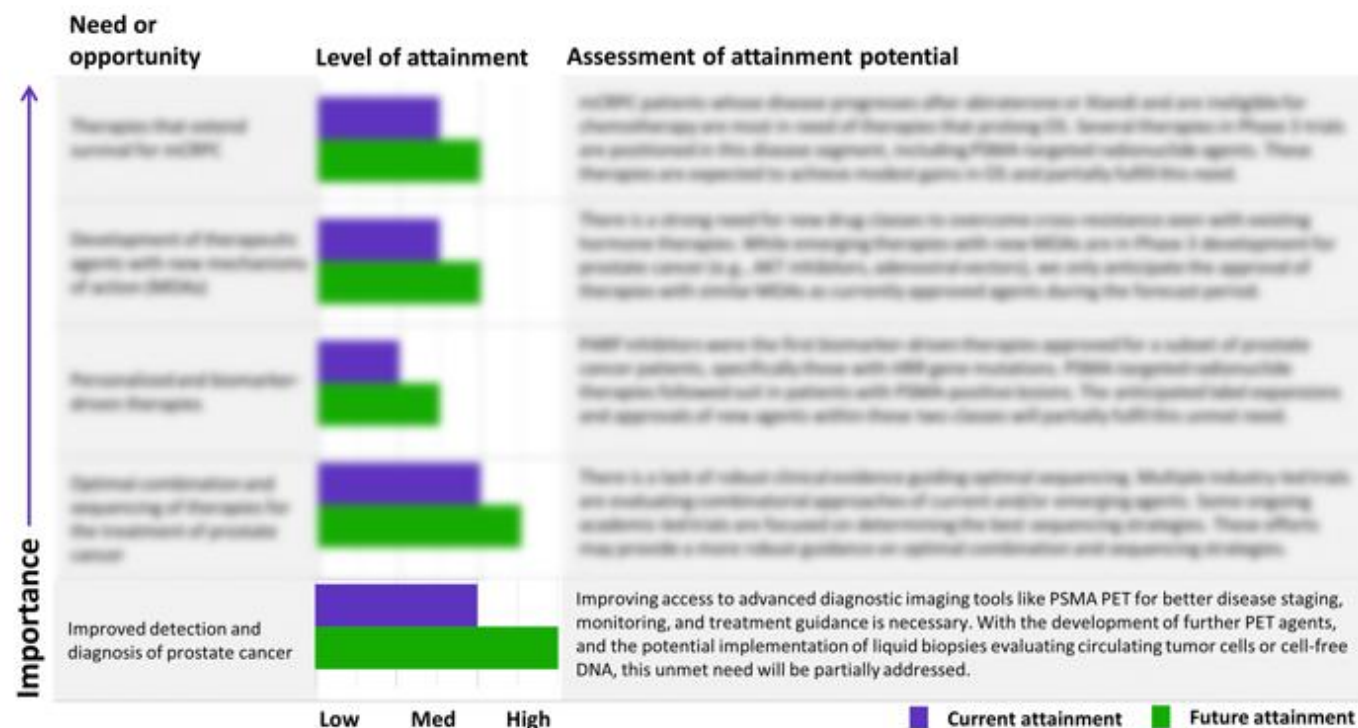
Comments on the OMAHA2a trial design

"Using hormones rather than chemotherapy as the control arm is appropriate because opevesostat is oral, and it'd be very hard to do an oral versus IV trial. Most patients who signed up for this study won't want chemotherapy, so the selected patients will be those with slow-growing disease, without visceral metastases, and with fewer symptoms. I don't think the European authorities will like the control arm, but in America, it has a good shot." —Medical oncologist, United States

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Question answered

What clinical unmet needs remain unfulfilled and represent the top opportunities for drug developers?



Last updated: August 2024



About Clarivate

Disease Intelligence and Analytics

Disease intelligence you can trust



Size your market

Understand global and local markets, by gauging the size of the drug treatable population, where they're located, and how populations will change over time.



Identify unmet needs

Identify areas of unmet need and direct your clinical development strategy to the areas with the greatest opportunity.



Fuel successful market access

Optimize your market access strategy with brand-level insight regarding the impact of payer policy on physician prescribing behavior.



Assess and prioritize opportunities

Evaluate market potential for your assets – and those of your competitors – and optimize your strategy with indication-specific market intelligence combined with world-class epidemiology.



Understand the patient journey

Gain visibility into brand usage by line of therapy with RWD and uncover the 'why' behind treatment pathways and brand usage with in-depth coverage of physician perceptions on disease management.



Optimize your brand positioning

Analyze treatment pathways across highly dynamic oncology indications to support brand positioning, strategic planning, and business development.

Find out more

Learn more about how Clarivate can help you maximize your market share:

clarivate.com/products/biopharma/portfolio-strategy-business-development



Think forward™

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About Clarivate

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