GBI Research
Global Business Intelligence

London – 31 August 2016 - Glioblastoma, a particularly aggressive form of brain tumor, has a promising treatment pipeline, with 120 first-in-class programs acting on 86 first-in-class molecular targets, according to business intelligence provider GBI Research.

The company's latest report states that the glioblastoma therapy pipeline, which includes 512 products active across all stages of development, is moderately sized but highly innovative. Potential factors driving the pipeline include vast unmet need, a growing patient pool if disease prognosis can be improved, a lack of approved options in the market landscape, and a recently improved understanding of the disease pathophysiology, facilitating the development of novel compounds.

Adam Bradbury, MSc, Associate Analyst for GBI Research, explains: "Pipeline innovation has far-reaching strategic implications for all market participants as, despite the high attrition rate in glioblastoma, it is highly likely that many of the numerous first-in-class products, a number of which are supported by promising preclinical data, will reach the market over the coming decade, potentially transforming the clinical and commercial landscape."

For players in the market, the case for investment in innovative products has not weakened as a result of the challenging commercial environments in developed markets and, increasingly, developed nations. On the contrary, despite higher stakes and greater risks, the return on investment for innovative products reaching the market remains attractive and could increase in significance in years to come.

Bradbury continues: "There are many signaling pathways and cellular processes in glioblastoma that remain untargeted by the limited number of associated marketed products. While growth factor signaling, such as by vascular endothelial growth factor, is inhibited in current glioblastoma treatments, evidence is mounting for the importance of other parallel mechanisms, such as cancer stem cell growth, and extracellular matrix remodeling."

In terms of the glioblastoma deals landscape, activity is moderate and the mean value for co-development deals is below the industry average at $196.2 million, although the mean value

of licensing deals is above the industry average at $168 million, according to GBI Research.

Bradbury concludes: “One of the most lucrative recent deals, a licensing agreement between AstraZenenca and Targacept, involved a current first-in-class product, and was valued at $1.2 billion. Despite the risk that can be associated with first-in-class products, they have still been shown to be a highly desirable investment option.”