MELANOMA –
GLOBAL DRUG FORECAST AND MARKET ANALYSIS
TO 2023
Executive Summary

Table above presents the key metrics for melanoma in the eight major pharmaceutical markets (8MM) (US, France, Germany, Italy, Spain, UK, Japan, and Australia) during the forecast period from 2013–2023.

Robust Growth in the Melanoma Market Expected from 2013 Through 2023

GlobalData estimates that the value of the melanoma market in the US, 5EU (France, Germany, Italy, Spain, and the UK), Japan, and Australia in 2013 was $1.34 billion. This market is defined as sales of the major branded drugs commonly prescribed for melanoma patients across the 8MM. 62% of these sales, $836m, were generated in the US, with the 5EU representing the next largest region by sales with an estimated $373m (28%). Australia contributed the smallest proportion (10%) of sales to the global melanoma market, with 2013 sales of $131m. There were no branded sales for melanoma in Japan, as none of the major branded drugs were approved in the base year of this forecast.

By 2023, the end of the forecast period, GlobalData projects melanoma sales to rise to $5.64 billion in the 8MM, at a robust Compound Annual Growth Rate (CAGR) of 15.5%. In particular, GlobalData expects the 5EU melanoma market to grow most rapidly, increasing to $2.01 billion (a 36% share) by 2023, at a robust CAGR of 18.3%. Sales in the other regions are expected to increase by the end of the forecast period, however, the proportion of sales from the US and...
Executive Summary

Australia are forecast to decrease to 57% and 6%, respectively, while market share in Japan will increase to 1% by 2023.

Major drivers of the growth of the melanoma market over the forecast period include:

- Melanoma incident cases are increasing in all the markets covered. Overall, across the 8MM, the incidence of melanoma is expected to increase by an Annual Growth Rate (AGR) of 3.0% from 2013–2023. GlobalData expects there to be nearly 87,900 cases in 2023, rising from just under 70,000 in 2013. This increase, coupled with an anticipated increase in branded therapy prescription, will drive growth of the global melanoma market over the forecast period.

- The launch of premium-priced metastatic therapies, such as anti-PD-1 immunotherapy and BRAF/MEK inhibitor combinations, will extend treatment duration and replace cheaper, generic, chemotherapy regimens. GlobalData expects Bristol-Myers Squibb’s (BMS’) Yervoy (ipilimumab) and Opdivo (nivolumab) to garner label extension in the adjuvant setting for high-risk early-stage resected patients. These premium-priced agents will not only begin to replace interferon therapy, but are also expected to facilitate the gradual increase in the number of patients receiving branded therapy in this setting and thus increase the market size of this segment and the overall market.

Major barriers of the growth of the melanoma market over the forecast period include:

- Increasing cost-consciousness will limit premium pricing opportunities for pipeline agents in the melanoma market. Healthcare austerity measures are being incorporated across the major markets, and drug companies will need to consider the changing reimbursement landscape when determining pricing strategies for their drugs. GlobalData expects that this era of austerity and healthcare reform will negatively affect pharmaceutical companies’ ability to gain reimbursement approval for their new melanoma therapies.

- With the many recent drug launches, GlobalData expects the melanoma market to become increasingly crowded during the forecast period. GlobalData estimates that the
checkpoint immunotherapy and BRAF/MEK drug classes will represent more than 97% of the global melanoma market by 2023. GlobalData expects the barrier to entry for this market to become increasingly difficult for developers of future pipeline agents, resulting in the targeting of smaller, niche populations and fewer approvals towards the end of the forecast period.

Despite Strong Competition, Bristol-Myers Squibb to Remain the Leader of the Checkpoint Immunotherapy and Overall Melanoma Market

The 2011 launch of Yervoy propelled BMS onto the melanoma market and positioned the company as the premier immuno-oncology player. Yervoy has rapidly become the best-selling brand in melanoma, approaching blockbuster status in 2013, with growth fuelled by recent label extension in the first-line setting in Europe. With the launch of its second melanoma asset, the anti-PD-1 antibody, Opdivo (nivolumab), GlobalData expects BMS to further strengthen its position in the checkpoint immunotherapy and melanoma market. However, competition in this drug class is becoming intense as Merck’s Keytruda (pembrolizumab), which was approved in the US in 2014, is also expected to obtain first-line approval and garner uptake across the major markets. To circumvent this threat, BMS is actively developing its trump card, the combination of Yervoy and Opdivo, which has demonstrated promise in terms of increasing response rates and OS. GlobalData expects this combination to launch in 2017 and to wrest away significant patient share from anti-PD-1 monotherapy treatment in the first line, including Keytruda. In particular, GlobalData expects the approval of the Yervoy/Opdivo combination to drive robust growth of Yervoy’s sales, retaining Yervoy’s position as the market leader. Overall, GlobalData expects the checkpoint immunotherapy drug class to dominate the melanoma market, both BRAF
Executive Summary

wild-type and mutation-positive, with an overall 67% share of the melanoma market in 2023.

Figure below presents the gap analysis for the forecast period of major companies in the melanoma space.

**High Unmet Needs Remains for Efficacious Treatment Options for BRAF Wild-Type Patients**

As they are ineligible for treatment with BRAF/MEK inhibitors, BRAF wild-type advanced melanoma patients have fewer treatment options compared to BRAF mutation-positive patients. Mainstay of treatment is immune checkpoint inhibitors, however, despite the potential durable response offered by CTLA-4 and PD-1 immunotherapies, the majority of patients do not respond to these agents. Non-responders to immunotherapy have no further treatment options except largely ineffective chemotherapy or biochemotherapy regimens. Although there have been clinical studies to investigate the use of targeted agents for NRAS- or c-KIT-mutated patients, the results have not greatly enthused interviewed Key Opinion Leaders (KOLs). GlobalData does not expect any pipeline agent to substantially improve upon the current treatment options for BRAF wild-type patients, thus the unmet need for this segment is expected to remain high throughout the forecast period.

**High Commercial Opportunity for Adjuvant Treatments that Improve Cure Rates in Early-Stage, Resectable Melanoma Patients**

GlobalData’s KOLs report disappointment with the efficacy of current adjuvant interferon treatments for high-risk stage II and III melanoma patients. GlobalData primary research confirms that a large proportion of these patients receive surgery alone with no drug treatment, or enter clinical trials. Interviewed KOLs report that despite the availability of interferon adjuvant therapy, a significant proportion of these patients will ultimately recur or progress to metastatic disease. Because of this unmet need and the large patient pool, the melanoma adjuvant setting represents a lucrative setting for drug developers. BMS (Yervoy), Novartis (Tafinlar/Mekinist), and Roche (Zelboraf) are aiming to expand their metastatic
Executive Summary

Melanoma therapeutics into the adjuvant setting, and these label expansions are expected to be won in the second half of the forecast period. However, interviewed experts remain unconvinced by these drugs, particularly when considering their efficacy in light of the potential safety concerns with these agents. Overall, GlobalData expects there to remain high commercial reward for developers of efficacious and well-tolerated drugs that can improve the cure rate and cater to this large population of patients.

**Innovative Immune Checkpoint Inhibitor Combinations Required to Penetrate the Crowded Melanoma Market**

As the melanoma markets becomes increasingly saturated with the development of anti-PD-1 immunotherapies across the various lines of treatment, GlobalData expects developers of this drug class to focus on PD-1’s combination with other targeted agents to improve response rate and treatment outcome, and to differentiate their asset from competitors. Interviewed KOLs are enthusiastic about the potential efficacy of the dual checkpoint inhibitor combination, Yervoy and Opdivo, however, the increased toxicity associated with the combination remains a concern. GlobalData expects the development of safe and effective drug combinations involving anti-PD-1 immunotherapy to become a significant R&D strategy for developers looking to compete with BMS during and beyond the forecast period. For example, Merck is collaborating with GSK (now Novartis) to investigate the combination of its anti-PD-1 Keytruda with the BRAF/MEK inhibitor combination Tafinlar/Mekinist, and with Amgen to test the combination of Keytruda and talimogene laherparepvec (T-VEC). In addition, Merck is also running clinical trials to combine Keytruda with its own Sylatron or BMS’ Yervoy. Roche is also looking to enter the immune checkpoint melanoma market and is investigating its anti-PD-L1 asset, atezolizumab (MPDL3280A), in combination with Zelboraf and cobimetinib in an early-stage clinical study in melanoma. As anti-PD-1 immunotherapies hold the promise of long, durable response for metastatic patients, a safe combination that can improve response rate will have the potential to attract patient share even in an increasingly crowded melanoma market.

**Late-Stage Pipeline Agents to Have Limited Impact on the Future Melanoma Landscape**

GlobalData expects the approval of seven pipeline agents over the forecast period, however, none of these are expected to have a major impact on the overall melanoma market. Of these pipeline agents, Exelixis’ MEK inhibitor cobimetinib represents the sales leader with peak-year sales of $233m in 2023. Cobimetinib will garner uptake in combination with Roche’s Zelboraf, with this regimen expected to be the first-to-market BRAF/MEK inhibitor combination in Europe. However, without perceived efficacy advantage over Novartis’ Tafinlar/Mekinist, GlobalData does not expect this combination to have great impact.
on the US and Australian markets, where Novartis’ combination has already been marketed from early 2014. The second highest-selling pipeline agent, Array’s binimetinib is a MEK inhibitor that produces clinical responses in NRAS-mutated advanced melanoma patients, who currently have no mutation-specific targeted treatment. However, KOLs are not enthusiastic about its efficacy in this setting, and GlobalData, therefore, expects limited uptake of binimetinib despite its first-to-market status. Overall, the sales of binimetinib are estimated to peak at $123m in 2023, with $45m coming from sales in the NRAS setting and $78m from combination with Array’s (formerly Novartis’) BRAF inhibitor encorafenib. Other pipeline agents include Amgen’s T-VEC, NeoStem’s eltrapuldencel-T, encorafenib, Polynoma’s seviprotilmut-L, and Provectus’ PV-10; however, GlobalData forecasts these to have little impact on the overall melanoma market.

Figure below provides a competitive assessment of the most promising agents for melanoma during the forecast period.

What Do the Physicians Think?

KOLs expect anti-PD-1 immunotherapies to garner approval for first-line use and to soon become the standard of care for advanced melanoma.
“PD-1 was surprisingly approved for pembrolizumab in US early, and nivolumab was approved in Japan already, so my expectation is that both drugs will be on the market next year in Europe... At the moment, I would see them clearly in the first-line treatment, although pembrolizumab has been approved for the second line after ipilimumab failure in the US, but I don’t see that as an issue. I would say they are both well working in the first line.”

OUS Key Opinion Leader, September 2014

“It’s likely that early next year, we’ll actually see PD-1 antibodies approved as a first-line therapy, at least in BRAF wild-type patients.”

US Key Opinion Leader, December 2014

“My rough guess is about [a] 70% chance the patient will get, probably start with PD-1 in the future, when PD-1 becomes a first-line agent... regardless of BRAF status.”

US Key Opinion Leader, August 2014

“I think PD-1 is definitely going to be the main treatment... whether it’s PD-1 alone or PD-1 plus the combinations.”

OUS Key Opinion Leader, November 2014

Interviewed experts reported that high unmet need remains for BRAF wild-type melanoma patients.

“I have not seen any new approach for BRAF wild-type patients.”

OUS Key Opinion Leader, September 2014

“[The clinical unmet needs are] something with a decent response rate in the BRAF wild-type patients... We haven’t got access to PD-1 yet. It may be going to be good enough, but that’s the group of patients, with ipilimumab, there isn’t a great response rate.”

OUS Key Opinion Leader, December 2014

“What is getting sort of lost is that the response rate of these PD-1 agents is still in the range of 30% to 40% in highly screened and highly selected patients that go on to clinical trials.”

OUS Key Opinion Leader, December 2014

Interviewed KOLs call for novel adjuvant therapies to reduce the risk of relapse for resected melanoma and treatment-related toxicities, and enthuse about the potential to develop anti-PD-1 immunotherapy in the adjuvant setting.

“Oncologists have lost the confidence in [the] efficacy of these drugs [interferons]... Also, the oncologists are struggling because we are very concerned about the toxicity of interferons.”

OUS Key Opinion Leader, November 2014
Executive Summary

“I would think that adjuvant therapy is going to be anti-PD-1 in the future. And there are two trials that will likely happen; one is the intergroup trial of pembrolizumab vs. interferon which will, I think, inform us of the role of pembrolizumab but that will be six years [from now] before it's done.”

US Key Opinion Leader, November 2014

“At the moment, we certainly would be happy to actively participate in clinical trials [for adjuvant therapies], and potentially going to do so with anti-PD-1, because I think immunotherapy in the adjuvant setting may well be beneficial… Certainly with the clinical data in the metastatic setting, you would hope the PD-1 in the adjuvant setting will be as effective [as] or better than the ipilimumab.”

OUS Key Opinion Leader, December 2014

Experts are excited about the potential of combination therapies involving immune checkpoint inhibitors, such as Yervoy plus Opdivo.

“I'm a believer in combination of treatment, so I believe PD-1 antibodies plus targeted therapies might be an issue, and also PD-1 plus ipilimumab is a big issue.”

OUS Key Opinion Leader, September 2014

“My guess is that the combo [of ipilimumab and nivolumab] will be more effective, and at least in the big teaching hospitals or the big oncology centers, the combo will probably be the treatment of choice.”

OUS Key Opinion Leader, November 2014

“We certainly, I think, are ending the era of the single agent treatments and are moving into the era where it's all going to be combinations.”

US Key Opinion Leader, December 2014
# Table of Contents

## 1. Table of Contents

1.1 List of Tables .............................................................................. 18

1.2 List of Figures ........................................................................... 24

## 2. Introduction ............................................................................. 27

2.1 Catalyst .................................................................................. 27

2.2 Related Reports ....................................................................... 28

2.3 Upcoming Related Reports ....................................................... 28

## 3. Disease Overview ................................................................. 29

3.1 Etiology and Pathophysiology .................................................. 29

3.1.1 Etiology ............................................................................. 29

3.1.2 Pathophysiology ............................................................... 29

3.1.3 Melanoma Biomarkers ....................................................... 30

3.2 Clinical Staging ....................................................................... 31

3.3 Symptoms .............................................................................. 33

3.4 Prognosis ............................................................................... 33

3.5 Quality of Life ........................................................................ 35

## 4. Epidemiology ........................................................................... 36

4.1 Disease Background ............................................................... 36

4.2 Risk Factors and Comorbidities ............................................. 36

4.3 Global Trends ......................................................................... 39

4.3.1 US .................................................................................. 40
# Table of Contents

4.3.2 5EU ................................................................................................................. 40  
4.3.3 Japan and Australia ......................................................................................... 40  
4.4 Forecast Methodology ....................................................................................... 41  
4.4.1 Sources Used ................................................................................................. 43  
4.4.2 Sources Not Used .......................................................................................... 50  
4.4.3 Forecast Assumptions and Methods .............................................................. 50  
4.5 Epidemiological Forecast for Melanoma (2013–2023) .......................................... 53  
4.5.1 Diagnosed Incident Cases of Melanoma ......................................................... 53  
4.5.2 Age-Specific Diagnosed Incident Cases of Melanoma .................................... 55  
4.5.3 Sex-Specific Diagnosed Incident Cases of Melanoma Skin Cancer .............. 57  
4.5.4 Age-Standardized Diagnosed Incidence Rates .............................................. 59  
4.5.5 Pathological Stage at Diagnosis ...................................................................... 61  
4.5.6 Five-Year Diagnosed Prevalent Cases of Melanoma Skin Cancer ............... 62  
4.5.7 Five-Year Diagnosed Prevalent Cases of Melanoma Skin Cancer by Genetic Aberrations ........................................................................................................ 64  
4.6 Discussion .......................................................................................................... 66  
4.6.1 Epidemiological Forecast Insight .................................................................. 66  
4.6.2 Limitations of the Analysis ............................................................................ 67  
4.6.3 Strengths of the Analysis ............................................................................... 68  
5 Disease Management .............................................................................................. 69  
5.1 Diagnosis Overview ......................................................................................... 69  
5.2 Treatment Overview ......................................................................................... 70  
5.2.1 Localized Melanoma: Stage 0 to Stage IIC .................................................... 72
# Table of Contents

5.2.2 Regional Melanoma: Stage IIIA to Stage IIIC ................................................................. 73  
5.2.3 Unresectable and Metastatic Melanoma: Stage III and Stage IV .................................. 76  
5.3 US ........................................................................................................................................ 82  
5.3.1 Screening and Diagnosis .................................................................................................. 83  
5.3.2 Clinical Practices .............................................................................................................. 85  
5.4 France .................................................................................................................................... 87  
5.4.1 Screening and Diagnosis .................................................................................................. 88  
5.4.2 Clinical Practices .............................................................................................................. 88  
5.5 Germany ............................................................................................................................... 89  
5.5.1 Screening and Diagnosis .................................................................................................. 90  
5.5.2 Clinical Practices .............................................................................................................. 91  
5.6 Italy ....................................................................................................................................... 94  
5.6.1 Screening and Diagnosis .................................................................................................. 95  
5.6.2 Clinical Practices .............................................................................................................. 95  
5.7 Spain ..................................................................................................................................... 97  
5.7.1 Screening and Diagnosis .................................................................................................. 98  
5.7.2 Clinical Practices .............................................................................................................. 98  
5.8 UK ........................................................................................................................................ 99  
5.8.1 Screening and Diagnosis .................................................................................................. 100  
5.8.2 Clinical Practices .............................................................................................................. 100  
5.9 Japan ..................................................................................................................................... 102  
5.9.1 Screening and Diagnosis .................................................................................................. 102  
5.9.2 Clinical Practices .............................................................................................................. 103
# Table of Contents

5.10 Australia .............................................................................................................................. 104  
5.10.1 Screening and Diagnosis ............................................................................................... 105  
5.10.2 Clinical Practices .......................................................................................................... 106  

6 Competitive Assessment ........................................................................................................ 109  
6.1 Overview ............................................................................................................................. 109  
6.2 Interferon-based Adjuvant Therapies ................................................................................ 111  
6.2.1 Roferon-A (Interferon Alfa-2a) ..................................................................................... 111  
6.2.2 Intron A (Interferon Alfa-2b) ......................................................................................... 115  
6.2.3 Sylatron (Peginterferon Alfa-2b) .................................................................................. 119  
6.3 Immune Checkpoint Inhibitors .......................................................................................... 125  
6.3.1 Yervoy (Ipilimumab) ..................................................................................................... 125  
6.3.2 Opdivo (Nivolumab) ..................................................................................................... 135  
6.3.3 Keytruda (Pembrolizumab) .......................................................................................... 144  
6.4 BRAF Mutation-targeted Therapies .................................................................................. 152  
6.4.1 Zelboraf (Vemurafenib) ............................................................................................... 152  
6.4.2 Tafinlar (Dabrafenib) .................................................................................................. 159  
6.4.3 Mekinist (Trametinib) ................................................................................................. 165  
6.5 Other Therapeutic Classes ................................................................................................. 177  

7 Unmet Need and Opportunity ............................................................................................... 179  
7.1 Overview ............................................................................................................................. 179  
7.2 Therapeutic Options for BRAF Wild-Type Patients ......................................................... 181  
7.2.1 Unmet Need .................................................................................................................. 181  
7.2.2 Gap Analysis ................................................................................................................. 182
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.2.3 Opportunity</td>
<td>183</td>
</tr>
<tr>
<td>7.3 Therapies for Non-responders to PD-1 Immunotherapy</td>
<td>184</td>
</tr>
<tr>
<td>7.3.1 Unmet Need</td>
<td>184</td>
</tr>
<tr>
<td>7.3.2 Gap Analysis</td>
<td>185</td>
</tr>
<tr>
<td>7.3.3 Opportunity</td>
<td>187</td>
</tr>
<tr>
<td>7.4 Adjuvant Therapies for High-Risk Resectable Melanoma</td>
<td>189</td>
</tr>
<tr>
<td>7.4.1 Unmet Need</td>
<td>189</td>
</tr>
<tr>
<td>7.4.2 Gap Analysis</td>
<td>190</td>
</tr>
<tr>
<td>7.4.3 Opportunity</td>
<td>192</td>
</tr>
<tr>
<td>7.5 Effective Treatment for Brain Metastases</td>
<td>194</td>
</tr>
<tr>
<td>7.5.1 Unmet Need</td>
<td>194</td>
</tr>
<tr>
<td>7.5.2 Gap Analysis</td>
<td>195</td>
</tr>
<tr>
<td>7.5.3 Opportunity</td>
<td>197</td>
</tr>
<tr>
<td>7.6 Predictive Markers for Therapeutic Response to Immunotherapies</td>
<td>198</td>
</tr>
<tr>
<td>7.6.1 Unmet Need</td>
<td>198</td>
</tr>
<tr>
<td>7.6.2 Gap Analysis</td>
<td>199</td>
</tr>
<tr>
<td>7.6.3 Opportunity</td>
<td>201</td>
</tr>
<tr>
<td>8 Pipeline Assessment</td>
<td>202</td>
</tr>
<tr>
<td>8.1 Overview</td>
<td>202</td>
</tr>
<tr>
<td>8.2 Promising Drugs in Clinical Development</td>
<td>203</td>
</tr>
<tr>
<td>8.3 RAF/RAS/MEK Pathway-Targeting Therapies</td>
<td>205</td>
</tr>
<tr>
<td>8.3.1 Cobimetinib (GDC-0973)</td>
<td>205</td>
</tr>
<tr>
<td>8.3.2 Encorafenib (LGX818)</td>
<td>212</td>
</tr>
</tbody>
</table>
# Table of Contents

8.3.3 Binimetinib (MEK162) ........................................................................................................... 218

8.4 Immune-Related Therapies ................................................................................................. 225

8.4.1 Talimogene Laherparepvec .............................................................................................. 225

8.4.2 Eltrapulデンセル-T (NSB20) ............................................................................................ 233

8.4.3 Seviprotimut-L (POL-103A) ............................................................................................ 239

8.4.4 PV-10 .................................................................................................................................. 245

8.5 Promising Drugs in Early-Stage Development ................................................................... 251

8.5.1 PI3K/Akt/mTOR Pathway-Targeting Therapies ................................................................. 251

8.5.2 Cell Cycle Checkpoint Inhibitors .................................................................................... 253

8.5.3 Next-Generation BRAF Inhibitors .................................................................................. 255

8.5.4 Immunotherapies ............................................................................................................ 257

8.5.5 Antibody-Drug Conjugates ............................................................................................ 260

8.6 Other Drugs in Development ............................................................................................... 262

9 Current and Future Players ...................................................................................................... 264

9.1 Overview ............................................................................................................................... 264

9.2 Trends in Corporate Strategy ............................................................................................... 267

9.3 Company Profiles ................................................................................................................ 268

9.3.1 Bristol-Myers Squibb ........................................................................................................ 268

9.3.2 Novartis ............................................................................................................................ 271

9.3.3 Roche ............................................................................................................................... 274

9.3.4 Merck ............................................................................................................................... 277

10 Market Outlook ...................................................................................................................... 281

10.1 Global Markets .................................................................................................................... 281
# Table of Contents

10.1.1 Forecast .................................................................................................................. 281  
10.1.2 Drivers and Barriers — Global Issues................................................................. 285  
10.2 United States ......................................................................................................... 287  
10.2.1 Forecast ................................................................................................................ 287  
10.2.2 Key Events .......................................................................................................... 291  
10.2.3 Drivers and Barriers — US .................................................................................. 292  
10.3 5EU ......................................................................................................................... 294  
10.3.1 Forecast ................................................................................................................ 294  
10.3.2 Key Events .......................................................................................................... 298  
10.3.3 Drivers and Barriers — France ............................................................................ 299  
10.3.4 Drivers and Barriers — Germany ....................................................................... 301  
10.3.5 Drivers and Barriers — Italy ............................................................................... 302  
10.3.6 Drivers and Barriers — Spain ............................................................................. 304  
10.3.7 Drivers and Barriers — UK .................................................................................. 305  
10.4 Japan ....................................................................................................................... 307  
10.4.1 Forecast ................................................................................................................ 307  
10.4.2 Key Events .......................................................................................................... 310  
10.4.3 Drivers and Barriers — Japan ............................................................................. 310  
10.5 Australia ................................................................................................................... 312  
10.5.1 Forecast ................................................................................................................ 312  
10.5.2 Key Events .......................................................................................................... 315  
10.5.3 Drivers and Barriers — Australia ....................................................................... 316  
11 Appendix..................................................................................................................... 318
## Table of Contents

11.1 Bibliography .................................................................................................................. 318

11.2 Abbreviations .................................................................................................................. 345

11.3 Methodology .................................................................................................................... 350

11.4 Forecasting Methodology ................................................................................................. 350

11.4.1 Diagnosed Melanoma Patients .................................................................................. 350

11.4.2 Percent Drug-Treated Patients ................................................................................. 351

11.4.3 Drugs Included in Each Therapeutic Class ............................................................... 351

11.4.4 Launch and Patent Expiry Dates .............................................................................. 352

11.4.5 General Pricing Assumptions ................................................................................. 353

11.4.6 Average Body Weight and Surface Area Across the 8MM ....................................... 354

11.4.7 Individual Drug Assumptions ................................................................................. 355

11.4.8 Generic Erosion ....................................................................................................... 369

11.4.9 Pricing of Pipeline Agents ....................................................................................... 369

11.5 Primary Research – KOLs Interviewed for this Report .................................................. 371

11.6 Primary Research – Prescriber Survey ........................................................................... 374

11.7 About the Authors ........................................................................................................... 375

11.7.1 Analyst ..................................................................................................................... 375

11.7.2 Therapy Area Director ............................................................................................ 375

11.7.3 Epidemiologist ......................................................................................................... 376

11.7.4 Global Head of Healthcare ..................................................................................... 376

11.8 About GlobalData ........................................................................................................... 377

11.9 Disclaimer ....................................................................................................................... 377
1.1 List of Tables

Table 1: Stage Definitions for Melanoma.................................................................32
Table 2: The ABCED Rule of Melanoma Detection.............................................33
Table 3: Prognosis of Melanoma........................................................................34
Table 4: Risk Factors and Comorbidities for Melanoma of the Skin................38
Table 5: Melanoma of the Skin Staging Definition Equivalencies......................42
Table 6: 8MM, Sources of Melanoma of the Skin Incidence Data......................43
Table 7: 8MM, Sources of Melanoma of the Skin Incident Cases by Pathological Stage at Diagnosis Data 45
Table 8: 8MM, Sources of Melanoma of the Skin Five-Year Diagnosed Prevalent Cases by Stage Data ... 46
Table 9: 8MM, Sources of Melanoma of the Skin Diagnosed Prevalent Cases by Genetic Aberration ......47
Table 10: 8MM, Diagnosed Incident Cases of Melanoma of the Skin, Both Sexes, Ages ≥20 Years, N, Select Years 2013–2023 .................................................................54
Table 11: 8MM, Age-Specific Diagnosed Incident Cases of Melanoma of the Skin, N (Row%), 2013 ..........56
Table 12: 8MM, Sex-Specific Diagnosed Incident Cases of Melanoma of the Skin, Ages ≥20 Years, N (Row %), 2013 ...........................................................................58
Table 13: Age-Standardized Diagnosed Incidence Rate (ASR) of Melanoma of the Skin, Men and Women, Ages ≥20 Years, 2013 .................................................................60
Table 14: 8MM, Five-Year Diagnosed Prevalent Cases of Melanoma of the Skin, Both Sexes, ≥20 years, N, Select Years 2013–2023 .................................................................63
Table 15: Clinical Guidelines for Melanoma..........................................................71
Table 16: Most Prescribed Drugs for Melanoma by Class in the Global Markets, 2013 .................................................................82
Table 17: Country Profile — US ........................................................................83
Table 18: Country Profile — France .....................................................................87
Table 19: Country Profile — Germany ................................................................90
Table 20: Country Profile — Italy ........................................................................94
Table of Contents

Table 21: Country Profile — Spain ................................ ................................ ................................ .............. 97
Table 22: Country Profile — UK ................................ ................................ ................................ .................. 99
Table 23: Country Profile — Japan ................................ ................................ ................................ ........... 102
Table 24: Country Profile — Australia ................................ ................................ ................................ ....... 104
Table 25: Leading Treatments for Melanoma, 2013 ................................ ................................ ................... 110
Table 26: Product Profile — Roferon-A ................................ ................................ ................................ ..... 112
Table 27: Safety of Roferon-A ................................ ................................ ................................ ................... 113
Table 28: Roferon-A SWOT Analysis, 2015 ................................ ................................ ............................... 114
Table 29: Global Sales Forecast ($m) for Roferon-A, 2013–2023 ................................ .............................. 115
Table 30: Product Profile — Intron A ................................ ................................ ................................ ......... 116
Table 31: Efficacy of Intron A (E1684) ................................ ................................ ................................ ....... 117
Table 32: Safety of Intron A (E1684, E1690, and E1694) ................................ ................................ .......... 118
Table 33: Intron A SWOT Analysis, 2015 ................................ ................................ ................................ .. 118
Table 34: Global Sales Forecast ($m) for Intron A, 2013–2023 ................................ ................................ .. 119
Table 35: Product Profile — Sylatron ................................ ................................ ................................ ........ 121
Table 36: Efficacy of Sylatron (EORTC 18991, NCT00006249) ................................ ................................ . 122
Table 37: Head-to-Head Comparison Between Sylatron and Low-Dose Interferon ................................ .... 123
Table 38: Safety of Sylatron ................................ ................................ ................................ ...................... 124
Table 39: Sylatron SWOT Analysis, 2015 ................................ ................................ ................................ .. 124
Table 40: Global Sales Forecast ($m) for Sylatron, 2013–2023 ................................ ................................ .. 125
Table 41: Product Profile — Yervoy ................................ ................................ ................................ .......... 127
Table 42: Efficacy of Yervoy ................................ ................................ ................................ ...................... 129
Table 43: Comparison of Higher Dose Yervoy and Dacarbazine (NCT00324155) ................................ ...... 130
Table 44: Network Meta-analysis of Yervoy ................................ ................................ ............................... 131
Table of Contents

Table 45: Safety of Yervoy at 3mg/kg (NCT00094653) ................................................................. 132
Table 46: Safety Data from Yervoy Dose-Escalation Study (NCT00289640) ........................................ 133
Table 47: Yervoy SWOT Analysis, 2015 ......................................................................................... 134
Table 48: Global Sales Forecast ($m) for Yervoy, 2013–2023 ........................................................ 135
Table 49: Product Profile — Opdivo ................................................................................................. 138
Table 50: Efficacy of Opdivo ........................................................................................................ 140
Table 51: Efficacy of Opdivo in BRAF Wild-Type Advanced Melanoma (NCT01721772) .................. 141
Table 52: Safety Data from Opdivo Dose-Escalation Study (NCT00730639) ................................... 142
Table 53: Safety Data from the CheckMate-037 Trial (NCT01721746) .......................................... 142
Table 54: Opdivo SWOT Analysis, 2015 ....................................................................................... 143
Table 55: Global Sales Forecast ($m) for Opdivo, 2013–2023 ....................................................... 144
Table 56: Product Profile – Keytruda ............................................................................................ 147
Table 57: Efficacy of Keytruda from KEYNOTE-001 (NCT01295827) ........................................... 148
Table 58: Efficacy of Keytruda from KEYNOTE-002 (NCT01704287) ............................................. 149
Table 59: Safety of Keytruda ........................................................................................................ 150
Table 60: Keytruda SWOT Analysis, 2015 ..................................................................................... 151
Table 61: Global Sales Forecasts ($m) for Keytruda, 2013–2023 .................................................... 152
Table 62: Product Profile — Zelboraf ............................................................................................. 154
Table 63: Efficacy of Zelboraf ....................................................................................................... 156
Table 64: Safety of Zelboraf ........................................................................................................ 157
Table 65: Zelboraf SWOT Analysis, 2015 .................................................................................... 158
Table 66: Global Sales Forecasts ($m) for Zelboraf, 2013–2023 .................................................... 159
Table 67: Product Profile — Tafinlar ............................................................................................ 161
Table 68: Efficacy of Tafinlar ....................................................................................................... 162
Table of Contents

Table 93: Efficacy of Binimetinib (NCT01320085) ...........................................................................................................221
Table 94: Safety of Binimetinib (NCT01320085) ................................................................................................................222
Table 95: Binimetinib SWOT Analysis, 2015 .....................................................................................................................224
Table 96: Global Sales Forecasts ($m) for Binimetinib, 2013–2023 ..................................................................................225
Table 97: Product Profile — Talimogene Laherparepvec ....................................................................................................228
Table 98: Efficacy of Talimogene Laherparepvec ...............................................................................................................229
Table 99: Safety of Talimogene Laherparepvec ..................................................................................................................230
Table 100: Talimogene Laherparepvec SWOT Analysis, 2015 ........................................................................................232
Table 101: Global Sales Forecast ($m) for Talimogene Laherparepvec, 2013–2023 ............................................................233
Table 102: Product Profile — Eltrapuldencel-T ..................................................................................................................235
Table 103: Efficacy of Eltrapuldencel-T ..........................................................................................................................236
Table 104: Eltrapuldencel-T SWOT Analysis, 2015 .........................................................................................................238
Table 105: Global Sales Forecast ($m) for Eltrapuldencel-T, 2013–2023 .......................................................................239
Table 106: Product Profile — Seviprotimut-L ....................................................................................................................241
Table 107: Efficacy of Seviprotimut-L ..............................................................................................................................242
Table 108: Seviprotimut-L SWOT Analysis, 2015 ............................................................................................................244
Table 109: Global Sales Forecast ($m) for Seviprotimut-L, 2013–2023 ............................................................................245
Table 110: Product Profile — PV-10 ....................................................................................................................................246
Table 111: Efficacy of PV-10 ...............................................................................................................................................247
Table 112: Safety of PV-10 .................................................................................................................................................248
Table 113: PV-10 SWOT Analysis, 2015 ..........................................................................................................................250
Table 114: Global Sales Forecast ($m) for PV-10, 2013–2023 ..........................................................................................251
Table 115: Clinical Settings of Early-Stage Drugs Targeting the PI3K/Akt/mTOR Pathway ..................................................253
Table 116: Clinical Settings of Early-Stage Drugs Targeting Cell Cycle Checkpoints ......................................................255
Table of Contents

Table 117: Clinical Settings of Early-Stage Next-Generation BRAF Inhibitors .......................................................... 256
Table 118: Clinical Settings of Early-Stage Immunotherapies ...................................................................................... 260
Table 119: Clinical Settings of Early-Stage Antibody-drug Conjugates ................................................................. 261
Table 120: Drugs in Development, 2015 .................................................................................................................... 262
Table 121: Key Companies in the Melanoma Market in the 8MM, 2013–2023 ......................................................... 265
Table 122: BMS’ Melanoma Portfolio Assessment, 2015 .......................................................................................... 270
Table 123: Novartis’ Melanoma Portfolio Assessment, 2015 ................................................................................... 273
Table 124: Roche’s Melanoma Portfolio Assessment, 2015 ...................................................................................... 276
Table 125: Merck’s Melanoma Portfolio Assessment, 2015 ..................................................................................... 279
Table 126: Global Sales Forecast ($m) for Melanoma, 2013–2023 ......................................................................... 283
Table 127: Melanoma Market — Drivers and Barriers, 2015 .................................................................................. 285
Table 128: Sales Forecast ($m) for Melanoma in the United States, 2013–2023 ......................................................... 289
Table 129: Key Events Impacting Sales for Melanoma in the United States, 2013–2023 ................................. 291
Table 130: Melanoma Market in the United States — Drivers and Barriers, 2015 .................................................. 292
Table 131: Sales Forecast ($m) for Melanoma in the 5EU, 2013–2023 ................................................................. 296
Table 132: Key Events Impacting Sales for Melanoma in the 5EU, 2013–2023 ....................................................... 298
Table 133: Melanoma Market in France — Drivers and Barriers, 2015 ................................................................. 299
Table 134: Melanoma Market in Germany — Drivers and Barriers, 2015 .............................................................. 301
Table 135: Melanoma Market in Italy — Drivers and Barriers, 2015 .................................................................. 302
Table 136: Melanoma Market in Spain — Drivers and Barriers, 2015 ................................................................. 304
Table 137: Melanoma Market in the United Kingdom — Drivers and Barriers, 2015 .......................................... 305
Table 138: Sales Forecast ($m) for Melanoma in Japan, 2013–2023 ................................................................. 309
Table 139: Key Events Impacting Sales for Melanoma in Japan, 2013–2023 ....................................................... 310
Table 140: Melanoma Market in Japan — Drivers and Barriers, 2015 ................................................................. 310
Table of Contents

Table 141: Sales Forecast ($m) for Melanoma in Australia, 2013–2023 .......................................................... 313
Table 142: Key Events Impacting Sales for Melanoma in Australia, 2013–2023 .................................................. 315
Table 143: Melanoma Market in Australia – Drivers and Barriers, 2015 ............................................................. 316
Table 144: Key Launch Dates .......................................................................................................................... 352
Table 145: Key Patent Expiries ....................................................................................................................... 353
Table 146: Average Body Weight and Surface Area Across the 8MM ............................................................ 354
Table 147: High-Prescribing Physicians Surveyed by Country ......................................................................... 374

1.2 List of Figures

Figure 1: 8MM, Diagnosed Incident Cases of Melanoma of the Skin, Ages ≥20 Years, Both Sexes, N, 2013–2023 .......................................................................................................................... 54
Figure 2: Age-Specific Diagnosed Incident Cases of Melanoma of the Skin, Both Sexes, N, 2013 .............. 57
Figure 3: Sex-Specific Diagnosed Incident Cases of Melanoma of the Skin (N), 2013 .................................. 59
Figure 4: Age-Standardized Diagnosed Incidence Rate (ASR) of Melanoma of the Skin, Men and Women, Ages ≥20 Years, 2013 ........................................................................................................... 61
Figure 5: Distribution of Incident Cases of Melanoma Skin Cancer by Stage at Diagnosis (%) .................... 62
Figure 6: 8MM, Five-Year Diagnosed Prevalent Cases of Melanoma of the Skin, Both Sexes, Ages ≥20 Years, N, 2013–2023 ..................................................................................................................... 64
Figure 7: Five-Year Diagnosed Prevalent Cases of Melanoma of the Skin with BRAF Mutations, Both Sexes, Ages ≥20 Years, N, 2013 ............................................................................................................ 65
Figure 8: Five-Year Diagnosed Prevalent Cases of Melanoma of the Skin with NRAS Mutations, Both Sexes, Ages ≥20 Years, 2013 ............................................................................................................. 66
Figure 9: Treatment Flowchart for Localized Melanoma .................................................................................. 73
Figure 10: Treatment Flowchart for Regional Melanoma .............................................................................. 74
Figure 11: Treatment Flowchart for Recurrent Melanoma ............................................................................ 76
Figure 12: Treatment Flowchart for Metastatic Melanoma ............................................................................ 78
## Table of Contents

Figure 13: Yervoy’s Development in Melanoma ................................................................. 128  
Figure 14: Opdivo’s Development in Melanoma ............................................................... 138  
Figure 15: Keytruda’s Development in Melanoma ............................................................. 147  
Figure 16: Zelboraf’s Development in Melanoma ............................................................... 155  
Figure 17: Mekinist’s Development in Melanoma ............................................................... 169  
Figure 18: Melanoma — Phase III Pipeline, 2015 ................................................................. 204  
Figure 19: Competitive Assessment of Late-Stage Pipeline Agents in Melanoma, 2013–2023 . 205  
Figure 20: Cobimetinib’s Development in Melanoma ....................................................... 207  
Figure 21: Clinical and Commercial Positioning of Cobimetinib ......................................... 210  
Figure 22: Encorafenib’s Development in Melanoma ......................................................... 214  
Figure 23: Clinical and Commercial Positioning of Encorafenib ......................................... 216  
Figure 24: Binimetinib’s Development in Melanoma .......................................................... 220  
Figure 25: Clinical and Commercial Positioning of Binimetinib ......................................... 223  
Figure 26: Talimogene Laherparepvec’s Development in Melanoma .................................... 228  
Figure 27: Clinical and Commercial Positioning of Talimogene Laherparepvec ....................... 231  
Figure 28: Eltrapuldencel-T’s Development in Melanoma ................................................... 235  
Figure 29: Clinical and Commercial Positioning of Eltrapuldencel-T ..................................... 237  
Figure 30: Seviprotimut-L’s Development in Melanoma ....................................................... 241  
Figure 31: Clinical and Commercial Positioning of Seviprotimut-L ....................................... 243  
Figure 32: PV-10’s Development in Melanoma ................................................................. 247  
Figure 33: Clinical and Commercial Positioning of PV-10 .................................................. 249  
Figure 34: Global Sales of Branded Products for Melanoma by Company, 2013–2023 ............ 266  
Figure 35: Company Portfolio Gap Analysis in Melanoma, 2013–2023 ............................... 267  
Figure 36: Bristol-Myers Squibb SWOT Analysis in Melanoma, 2013–2023 ......................... 271
Table of Contents

Figure 37: Novartis SWOT Analysis in Melanoma, 2013–2023 ................................................................. 274
Figure 38: Roche SWOT Analysis in Melanoma, 2013–2023 ................................................................. 277
Figure 39: Merck SWOT Analysis in Melanoma, 2013–2023 ................................................................. 280
Figure 40: Global Sales for Melanoma by Region, 2013–2023 .............................................................. 284
Figure 41: Sales for Melanoma in the United States by Drug Class, 2013–2023 ...................................... 290
Figure 42: Sales for Melanoma in the EU by Drug Class, 2013–2023 .................................................. 297
Figure 43: Sales for Melanoma in Japan by Drug Class, 2023 ............................................................... 309
Figure 44: Sales for Melanoma in Australia by Drug Class, 2013–2023 ................................................ 314
Introduction

2 Introduction

2.1 Catalyst

Melanoma is the deadliest and most aggressive form of skin cancer. Melanoma is rare compared to other major cancer indications, but the incident cases are increasing because of the aging population and changes in lifestyle that result in more ultraviolet (UV) exposure. Although only 3–7% of patients in the major markets (US, France, Germany, Italy, Spain, UK, and Australia; excludes Japan) are diagnosed with unresectable stage III or stage IV metastatic disease, which has poor prognoses, a significant proportion of resectable stage III diseases (47–57%) progresses to metastatic melanoma. In 2011 the first two targeted therapies were approved, Yervoy (ipilimumab) and Zelboraf (vemurafenib); they have revolutionized the treatment landscape of melanoma, which previously was heavily dependent on generic chemotherapy. Though these new treatments have extended the survival of metastatic patients compared to chemotherapy-only regimens, high unmet needs remain for the non-responders to these targeted treatments, especially BRAF wild-type patients.

The melanoma market is expected to grow robustly due to the uptake of novel treatments approved in 2014, including Novartis’ (formerly GlaxoSmithKline’s [GSK’s]) Tafinlar/Mekinist (dabrafenib/trametinib) combination, Bristol-Myers Squibb’s (BMS’) Opdivo (nivolumab), and Merck’s Keytruda (pembrolizumab). These agents will be utilized in early lines of metastatic therapy, and will push the use of chemotherapy to later lines of treatment. Furthermore, GlobalData expects the label expansion of Yervoy and Opdivo as a combination treatment for the first-line metastatic setting. This premium-priced combination is expected to be the main driver for the melanoma market in the second half of the forecast period. Ultimately, however, GlobalData expects unmet needs to remain, particularly for early-stage patients, and anticipates that novel, innovative approaches, such as safer immune checkpoint inhibitor combinations, will provide the best opportunity for substantial improvement in the prognosis of advanced melanoma patients.
Introduction

2.2 Related Reports


2.3 Upcoming Related Reports

- GlobalData (2015). Multiple Myeloma – Global Drug Forecast and Market Analysis to 2023
- GlobalData (2015). Renal Cell Carcinoma – Global Drug Forecast and Market Analysis to 2023
Appendix

11.8 About GlobalData

GlobalData is a leading global provider of business intelligence in the Healthcare industry. GlobalData provides its clients with up-to-date information and analysis on the latest developments in drug research, disease analysis, and clinical research and development. Our integrated business intelligence solutions include a range of interactive online databases, analytical tools, reports and forecasts. Our analysis is supported by a 24/7 client support and analyst team.

GlobalData has offices in New York, Boston, London, India and Singapore.

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