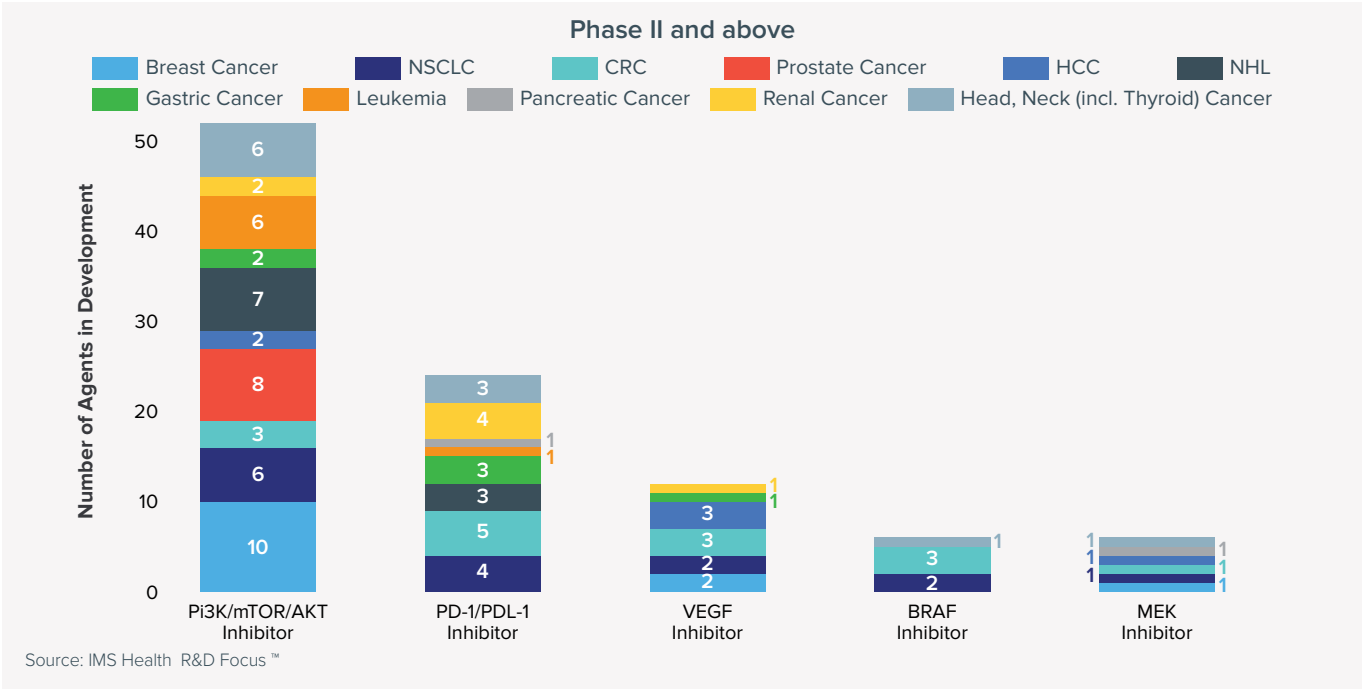


Validated pathways reduce clinical trial risk, facilitating “fast follower” strategies with rising competitive intensity

Pipeline by Number of Targeted Agents and Selected Pathways



- An analysis of pipeline agents for five specific mechanisms of action shows 100 phase II and phase III trials targeting eleven key tumors. These investigations include both NMEs and new indications for drugs currently on the market.
- Many molecules will fail to reach approval; however, the substantial number of NMEs in the classes with proven activity, e.g., VEGF and PD-1/PDL-1 inhibitors, suggests that direct competition can be expected to increase in multiple indications. This competition may lessen as products within a given class show differing levels of effectiveness in different cancers.