

CHAPTER ONE: INTRODUCTION.....	1
STUDY GOALS AND OBJECTIVES.....	1
REASONS FOR DOING THE STUDY	1
SCOPE OF REPORT	1
INTENDED AUDIENCE.....	2
METHODOLOGY	3
RELATED BCC STUDIES	3
ANALYST CREDENTIALS.....	3
BCC ONLINE SERVICES.....	3
DISCLAIMER	4
 CHAPTER TWO: SUMMARY.....	 5
SUMMARY.....	5
<i>SUMMARY TABLE GLOBAL BIOLOGICAL TREATMENT OF CANCER: MARKET BY REGION, THROUGH 2014 (\$ MILLIONS)</i>	6
<i>SUMMARY FIGURE GLOBAL BIOLOGICAL TREATMENT OF CANCER: MARKET BY REGION, 2008–2014 (\$ MILLIONS)</i>	7
 CHAPTER THREE: OVERVIEW	 8
GLOBAL CANCER MARKET.....	8
<i>TABLE 1 ESTIMATED GLOBAL INCIDENCE OF CANCER AND FORECAST BY REGION, 2007–2030 (MILLIONS)</i>	9
<i>FIGURE 1 ESTIMATED GLOBAL CANCER INCIDENCE AND FORECAST BY REGION, 2008–2030 (\$ MILLIONS)</i>	10
<i>TABLE 2 ESTIMATED GLOBAL CANCER-RELATED DEATHS AND FORECAST BY REGION, 2007–2030 (MILLIONS)</i>	11
<i>FIGURE 2 ESTIMATED GLOBAL CANCER-RELATED DEATHS AND FORECAST BY REGION, 2008 AND 2030 (MILLIONS)</i>	11
GLOBAL ONCOLOGY MARKET	12
<i>TABLE 3 GLOBAL ONCOLOGY MARKET SALES AND FORECAST BY REGION, THROUGH 2014 (\$ MILLIONS)</i>	13
<i>FIGURE 3 GLOBAL ONCOLOGY MARKET SALES AND FORECAST BY REGION, 2008–2014 (\$ MILLIONS)</i>	13
GLOBAL ONCOLOGY MARKET (CONTINUED).....	14
<i>TABLE 4 GLOBAL ONCOLOGY COMPANY SALES, THROUGH 2014 (\$ MILLIONS)</i>	15
EMERGING MARKETS.....	16
<i>TABLE 5 ONCOLOGY MARKET IN ASIA-PACIFIC BY COUNTRY, 2006–2008 (\$ MILLIONS)</i>	16
<i>TABLE 5 (CONTINUED)</i>	17
<i>FIGURE 4 ONCOLOGY MARKET IN ASIA-PACIFIC BY COUNTRY, 2006–2008 (\$ MILLIONS)</i>	17
GLOBAL CANCER BIOLOGICAL THERAPEUTIC MARKET.....	18
<i>TABLE 6 GLOBAL BIOTHERAPEUTICS SALES COMPARED TO TOTAL PRESCRIPTION DRUG SALES, 2008–2014 (\$ MILLIONS)</i>	19

<i>FIGURE 5 GLOBAL BIOTHERAPEUTICS SALES COMPARED TO TOTAL PRESCRIPTION DRUG SALES, 2008–2014 (\$ MILLIONS)</i>	19
<i>TABLE 7 GLOBAL BIOLOGICAL TREATMENT OF CANCER: MARKET FORECAST BY DRUG CLASS, THROUGH 2014 (\$ MILLIONS)</i>	20
<i>FIGURE 6 GLOBAL BIOLOGICAL TREATMENT OF CANCER: MARKET BY DRUG CLASS FORECAST, 2008–2014 (\$ MILLIONS)</i>	20
SIZE AND GROWTH OF THE CANCER BIOTHERAPEUTICS MARKET	21
<i>TABLE 8 GLOBAL BIOLOGICAL TREATMENT OF CANCER: MARKET FORECAST BY PRODUCT, THROUGH 2014 (\$ MILLIONS)</i>	21
Size and Growth ... (Continued)	22
ISSUES AND TRENDS AFFECTING THE MARKET	23
Issues and Trends ... (Continued).....	24
CHAPTER FOUR: BIOTHERAPEUTICS	25
WHAT IS CANCER?	25
CAUSES OF CANCER GROWTH	26
CAUSES OF CANCER GROWTH (CONTINUED)	27
CANCER TREATMENT STRATEGIES	28
COMMON TREATMENTS AND PROBLEMS.....	28
Surgery	28
Chemotherapy.....	28
Radiation Treatment	29
Targeted Therapy	30
Hormone Therapy	30
Biological Therapy of Cancer	30
Biological Therapy of Cancer (Continued).....	31
PRODUCT SEGMENTS AND TECHNOLOGY	32
MABS	32
<i>TABLE 9 MABS FOR CANCER TREATMENT</i>	33
mAbs (Continued).....	34
mAbs: Recent Market Activities and Trends.....	35
mAbs: ... (Continued).....	36
THE FUTURE FOR CANCER MONOCLONALS	37
<i>TABLE 10 NEW ANTIBODY-BASED DEVELOPMENTS WITH EPCAM</i>	38
MONOCLONALS ON THE MARKET	39
RITUXAN (RITUXIMAB)	39
Rituxan (Rituximab) (Continued)	40
<i>TABLE 11 GLOBAL BEST-SELLING MABS FOR CANCER, 2007–2009 (\$ MILLIONS)</i>	41
<i>FIGURE 7 GLOBAL BEST-SELLING MABS FOR CANCER 2007–2009 (\$ MILLIONS)</i>	42
<i>TABLE 12 U.S. BEST-SELLING MABS FOR CANCER, 2007–2009 (\$ MILLIONS)</i>	42

<i>FIGURE 8 U.S. BEST-SELLING MABS FOR CANCER, 2007–2009 (\$ MILLIONS)</i>	43
AVASTIN (BEVACIZUMAB).....	43
HERCEPTIN (TRASTUZUMAB).....	44
Herceptin (Trastuzumab) (Continued).....	45
Herceptin (Trastuzumab) (Continued).....	46
CAMPATH (ALEMTUZUMAB).....	47
ERBITUX (CETUXIMAB).....	48
Erbitux (Cetuximab) (Continued).....	49
Erbitux (Cetuximab) (Continued).....	50
MYLOTARG (GEMTUZUMAB OZOGAMICIN).....	51
VECTIBIX (PANITUMUMAB).....	51
BEXXAR.....	52
ZEVALIN.....	53
IFNS.....	54
<i>TABLE 13 GLOBAL IFN SALES FOR CANCER, 2007–2009 (\$ MILLIONS)</i>	55
<i>FIGURE 9 GLOBAL IFN SALES FOR CANCER, 2007–2009 (\$ MILLIONS)</i>	55
<i>TABLE 14 GLOBAL IL SALES FOR CANCER, 2007–2009 (\$ MILLIONS)</i>	56
ALDESLEUKIN.....	56
IFN-A.....	57
IFN- α (Continued).....	58
IFN- α (Continued).....	59
VACCINES.....	60
THERAPEUTIC CANCER VACCINES.....	60
Therapeutic Cancer Vaccines (Continued).....	61
Therapeutic Cancer Vaccines (Continued).....	62
<i>TABLE 15 CURRENT THERAPEUTIC VACCINE DEVELOPMENT AND POTENTIAL U.S. MARKET (\$ MILLIONS)</i>	63
PREVENTIVE CANCER VACCINES.....	64
<i>TABLE 16 GLOBAL BEST-SELLING PREVENTIVE VACCINES FOR CERVICAL CANCER, 2007–2014 (\$ MILLIONS)</i>	64
<i>FIGURE 10 GLOBAL BEST-SELLING PREVENTIVE VACCINES FOR CERVICAL CANCER, BY COMPANY, 2007–2014 (\$ MILLIONS)</i>	65
<i>TABLE 17 U.S. BEST-SELLING PREVENTIVE VACCINES FOR CERVICAL CANCER, BY COMPANY, 2008–2014 (\$ MILLIONS)</i>	65
<i>FIGURE 11 U.S. BEST-SELLING PREVENTIVE VACCINES FOR CERVICAL CANCER, BY COMPANY 2008–2014 (\$ MILLIONS)</i>	66
Gardasil.....	66
Gardasil (Continued).....	67
Cervarix.....	68
GROWTH FACTORS.....	69

<i>TABLE 18 GLOBAL SUPPORTIVE CARE DRUGS, 2007–2009 (\$ MILLIONS)</i>	70
<i>FIGURE 12 GLOBAL SUPPORTIVE CARE DRUGS, 2007–2009 (\$ MILLIONS)</i>	70
<i>TABLE 19 U.S. SUPPORTIVE CARE DRUGS, 2007–2009 (\$ MILLIONS)</i>	71
<i>FIGURE 13 U.S. SUPPORTIVE CARE DRUGS, 2007–2009 (\$ MILLIONS)</i>	71
GROWTH FACTORS (CONTINUED)	72
ARANESP	73
PROCRIT AND EPOGEN.....	74
NEULASTA	75
NEUPOGEN	75
LEUKINE/SARGRAMOSTIM	76
NEUMEGA (IL-11/OPRELVEKIN).....	76
BIOSIMILARS	77
OTHER BIOTHERAPY/GENE THERAPY	78
CHAPTER FIVE: PRODUCTS IN DEVELOPMENT.....	79
PRODUCTS IN DEVELOPMENT	79
DRUGS/COMPANIES IN DEVELOPMENT.....	80
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	81
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	82
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	83
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	84
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	85
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	86
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	87
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	88
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	89
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	90
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	91
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	92
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	93
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	94
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	95
<i>TABLE 20 BIOLOGICAL THERAPIES FOR CANCER IN CLINICAL DEVELOPMENT</i>	96
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	97
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	98
DRUGS/COMPANIES IN DEVELOPMENT (CONTINUED)	99
CLINICAL TRIALS IN ONCOLOGY.....	100
<i>TABLE 21 ONCOLOGY CLINICAL TRIALS, 2009 (NUMBER)</i>	100
<i>FIGURE 14 ONCOLOGY CLINICAL TRIALS, 2009 (NUMBER)</i>	101
NEW APPROVALS.....	101
NEW APPROVALS (CONTINUED).....	102

NEW APPROVALS (CONTINUED).....	103
TABLE 22 APPROVED BIOLOGICS FOR CANCER, 2009	104
CHAPTER SIX: MARKET DATA	105
MARKET SIZE AND GROWTH	105
MARKET BY PRODUCT TYPE.....	105
RITUXAN	105
AVASTIN	105
HERCEPTIN	106
NEULASTA	106
ARANESP	106
TABLE 23 GLOBAL TOP FOUR BIOLOGIC PRODUCTS BY ESTIMATED SALES, 2014 (\$ MILLIONS)	107
ONCOLOGY MARKET.....	107
TABLE 24 GLOBAL TOP CANCER BIOLOGICS AND SALES, 2007– 2009 (\$ MILLIONS).....	107
FIGURE 15 GLOBAL TOP CANCER BIOLOGICS SALES, BY DRUG CLASS, 2007–2009 (\$ MILLIONS).....	108
MARKET BY GEOGRAPHICAL SEGMENTS.....	108
MARKET BY GEOGRAPHICAL SEGMENTS (CONTINUED)	109
MARKET BY GEOGRAPHICAL SEGMENTS (CONTINUED)	110
U.S. MARKET.....	111
TABLE 25 U.S. BIOLOGICAL TREATMENT OF CANCER: MARKET FORECAST, BY DRUG CLASS, THROUGH 2014 (\$ MILLIONS).....	111
FIGURE 16 U.S. BIOLOGICAL TREATMENT OF CANCER: MARKET FORECAST BY DRUG CLASS, 2009 AND 2014 (\$ MILLIONS).....	111
TABLE 26 U.S. BIOLOGICAL TREATMENT OF CANCER: MARKET FORECAST BY PRODUCT, THROUGH 2014 (\$ MILLIONS).....	112
FIGURE 17 U.S. BIOLOGICAL TREATMENT OF CANCER: MARKET FORECAST BY BRAND NAME, 2009 AND 2014 (\$ MILLIONS).....	112
TABLE 27 CAMPATH SALES, 2007 AND 2008 (\$ MILLIONS).....	113
JAPAN (ASIA) MARKET	113
TABLE 28 JAPANESE BIOLOGICAL TREATMENT OF CANCER: MARKET FORECAST BY DRUG CLASS, THROUGH 2014 (\$ MILLIONS).....	114
FIGURE 18 JAPANESE BIOLOGICAL TREATMENT OF CANCER: MARKET FORECAST BY DRUG CLASS, 2009 AND 2014 (\$ MILLIONS).....	114
TABLE 29 JAPANESE BIOLOGICAL TREATMENT OF CANCER: MARKET FORECAST BY PRODUCT, THROUGH 2014 (\$ MILLIONS).....	115
FIGURE 19 JAPANESE BIOLOGICAL TREATMENT OF CANCER: MARKET FORECAST BY BRAND, 2009 AND 2014 (\$ MILLIONS).....	115
CANCER MARKET AND EUROPE	116
EUROPEAN/ROW MARKET	117

<i>TABLE 30 EUROPEAN/ROW BIOLOGICAL TREATMENT OF CANCER: MARKET FORECAST BY DRUG CLASS, THROUGH 2014 (\$ MILLIONS)</i>	117
<i>FIGURE 20 EUROPEAN/ROW BIOLOGICAL TREATMENT OF CANCER: MARKET FORECAST BY DRUG CLASS, 2009 AND 2014 (\$ MILLIONS)</i>	117
<i>TABLE 31 EUROPEAN/ROW BIOLOGICAL TREATMENT OF CANCER: MARKET FORECAST BY PRODUCT, THROUGH 2014 (\$ MILLIONS)</i>	118
<i>FIGURE 21 EUROPEAN/ROW BIOLOGICAL TREATMENT OF CANCER: MARKET FORECAST BY BRAND, 2009 AND 2014 (\$ MILLIONS)</i>	118
CANCER MARKET AND ASIA	119
CANCER MARKET AND AUSTRALIA	119
CANCER MARKET AND SOUTH KOREA	120
CANCER MARKET AND CHINA.....	120
CANCER MARKET AND TAIWAN.....	121
CANCER MARKET AND SINGAPORE.....	121
CANCER MARKET AND INDIA.....	122
BIOMAB-EGFR.....	122
<i>TABLE 32 COMPANIES IN ONCOLOGY IN THE ASIA-PACIFIC REGION</i>	122
<i>TABLE 32 (CONTINUED)</i>	123
MARKET DATA BY TOP-SELLING BIOLOGIC DRUGS	123
<i>TABLE 33 GLOBAL TOP-SELLING BIOLOGIC DRUGS, 2007–2009 (\$ MILLIONS)</i>	123
<i>TABLE 33 (CONTINUED)</i>	124
<i>FIGURE 22 GLOBAL TOP-SELLING BIOLOGIC DRUGS, BY BRAND, 2007–2009 (\$ MILLIONS)</i>	124
<i>TABLE 34 U.S. TOP-SELLING BIOLOGIC DRUGS, 2007–2009 (\$ MILLIONS)</i>	125
<i>FIGURE 23 U.S. TOP-SELLING BIOLOGIC DRUGS, BY BRAND, 2007– 2009 (\$ MILLIONS)</i>	125
CHAPTER SEVEN: GLOBAL CANCER STATISTICS	126
CANCER TRENDS	126
CANCER TRENDS (CONTINUED).....	127
CANCER TRENDS (CONTINUED).....	128
<i>TABLE 35 PROJECTED CANCER INCIDENCE WORLDWIDE, 2008– 2030 (MILLIONS)</i>	129
<i>FIGURE 24 PROJECTED CANCER INCIDENCE WORLDWIDE, 2008– 2030 (MILLIONS)</i>	129
<i>TABLE 36 GLOBAL DISTRIBUTION OF NEW CANCER CASES BY GEOGRAPHIC REGION, 2009 (MILLIONS)</i>	130

<i>FIGURE 25 GLOBAL DISTRIBUTION OF NEW CANCER CASES BY GEOGRAPHIC REGION, 2009 (MILLIONS)</i>	131
GLOBAL CANCER INCIDENCE BY DIFFERENT TYPES OF CANCER	131
<i>TABLE 37 GLOBAL CANCER INCIDENCE BY CANCER TYPE, 2008 (MILLIONS)</i>	132
<i>TABLE 37 (CONTINUED)</i>	133
<i>FIGURE 26 GLOBAL CANCER INCIDENCE BY CANCER TYPE, 2008 (MILLIONS)</i>	133
<i>TABLE 38 GLOBAL CANCER DEATHS BY CANCER TYPE, 2008 (MILLIONS)</i>	134
<i>FIGURE 27 GLOBAL CANCER DEATHS BY CANCER TYPE, 2008 (MILLIONS)</i>	135
GLOBAL CANCER INCIDENCE BY ... (CONTINUED)	136
<i>TABLE 39 GLOBAL DISTRIBUTION OF CANCERS BY SITE, 2009 (MILLIONS)</i>	137
<i>TABLE 40 GLOBAL NUMBER OF NEW CANCER CASES BY SITE AND GEOGRAPHIC REGION, 2009 (MILLIONS)</i>	138
<i>TABLE 41 NUMBER OF NEW CANCER CASES BY SITE, 2020 (MILLIONS/%)</i>	139
<i>TABLE 42 GLOBAL NUMBER OF ESTIMATED NEW CANCER CASES BY SITE AND GEOGRAPHIC REGION, 2020 (MILLIONS)</i>	140
CANCER'S ECONOMIC BURDEN	141
<i>TABLE 43 GLOBAL CANCER: INCIDENCE AND DEATHS BY SEX, 2008 (MILLIONS)</i>	142
<i>FIGURE 28 GLOBAL CANCER: INCIDENCE AND DEATHS BY SEX, 2008 (MILLIONS)</i>	142
EMERGING MARKETS	143
<i>TABLE 44 GLOBAL BIOLOGICAL TREATMENT OF CANCER: MARKET BY CANCER INCIDENCE AND TYPE, 2007 AND 2008 (MILLIONS)</i>	143
<i>TABLE 44 (CONTINUED)</i>	144
<i>FIGURE 29 GLOBAL BIOLOGICAL TREATMENT OF CANCER: MARKET BY CANCER INCIDENCE AND TYPE, 2007 AND 2008 (MILLIONS)</i>	144
EMERGING MARKETS (CONTINUED)	145
AFRICA	146
AFRICA (CONTINUED).....	147
ASIA.....	148
CHINA	148
MALAYSIA	149
INDIA	149
India (Continued).....	150
EUROPE.....	151

NORTH AMERICA	151
TABLE 45 U.S. CANCER INCIDENCE BY CANCER TYPE, 2007–2009 (MILLIONS).....	152
FIGURE 30 U.S. CANCER INCIDENCE BY CANCER TYPE, 2007–2009 (MILLIONS).....	152
TABLE 46 U.S. CANCER DEATHS BY CANCER TYPE, 2007–2009 (MILLIONS).....	153
FIGURE 31 U.S. CANCER DEATHS BY CANCER TYPE, 2007–2009 (MILLIONS).....	153
CHAPTER EIGHT: DESCRIPTION OF CANCERS.....	154
LUNG CANCER.....	154
LUNG CANCER (CONTINUED)	155
LUNG CANCER TREATMENT	156
USE OF BIOLOGICS.....	157
Use of Biologics (Continued)	158
BLADDER CANCER	159
BLADDER CANCER (CONTINUED)	160
BREAST CANCER.....	161
BREAST CANCER (CONTINUED)	162
BREAST CANCER (CONTINUED)	163
HER2 EXPRESSION	164
HER2 Expression (Continued).....	165
HER2 Expression (Continued).....	166
HER2 Expression (Continued).....	167
ANTIANGIOGENIC/HER2 AGENTS	168
Antiangiogenic/HER2 Agents (Continued).....	169
CERVICAL CANCER	170
VACCINES	171
COLORECTAL CANCER (CRC)	172
COLORECTAL CANCER (CRC) (CONTINUED).....	173
COLORECTAL CANCER (CRC) (CONTINUED).....	174
COLORECTAL CANCER (CRC) (CONTINUED).....	175
COLORECTAL CANCER (CRC) (CONTINUED).....	176
SMALL INTESTINE CANCER.....	177
SMALL INTESTINE CANCER (CONTINUED)	178
SMALL INTESTINE CANCER (CONTINUED)	179
ESOPHAGEAL CANCER.....	180
ESOPHAGEAL CANCER (CONTINUED)	181
KIDNEY	182
KIDNEY (CONTINUED).....	183
KIDNEY (CONTINUED).....	184
KIDNEY (CONTINUED).....	185
KIDNEY (CONTINUED).....	186
LEUKEMIA.....	187

LIVER.....	188
LIVER (CONTINUED)	189
LIVER (CONTINUED)	190
LIVER (CONTINUED)	191
LYMPHOMA	192
LYMPHOMA (CONTINUED).....	193
NHL	194
NHL (Continued)	195
<i>TABLE 47 MABS FOR TREATMENT OF NHL</i>	<i>196</i>
NHL (Continued)	197
MALT LYMPHOMA.....	198
MANTLE CELL LYMPHOMA	199
MEDIASTINAL B-CELL LYMPHOMA	199
BURKITT LYMPHOMA	200
MELANOMA.....	200
MELANOMA (CONTINUED)	201
MELANOMA (CONTINUED)	202
MELANOMA (CONTINUED)	203
MELANOMA (CONTINUED)	204
MELANOMA (CONTINUED)	205
MELANOMA (CONTINUED)	206
MULTIPLE MYELOMA	207
MULTIPLE MYELOMA (CONTINUED).....	208
MULTIPLE MYELOMA (CONTINUED).....	209
MULTIPLE MYELOMA (CONTINUED).....	210
BRAIN CANCER	211
BRAIN CANCER (CONTINUED)	212
BRAIN CANCER (CONTINUED)	213
BRAIN CANCER (CONTINUED)	214
GLIOMAS	215
Astrocytomas	215
Astrocytomas (Continued)	216
Oligodendroglioma.....	217
Ependymoma	217
MENINGIOMAS	217
ACOUSTIC NEUROMA/SCHWANNOMAS.....	218
MEDULLOBLASTOMA.....	218
OVARIAN CANCER	219
OVARIAN CANCER (CONTINUED).....	220
Epithelial Tumors.....	221
Metastatic Tumors.....	221
Metastatic Tumors (Continued)	222
PANCREATIC CANCER.....	223
PANCREATIC CANCER (CONTINUED).....	224

PANCREATIC CANCER (CONTINUED).....	225
PANCREATIC CANCER (CONTINUED).....	226
PANCREATIC CANCER (CONTINUED).....	227
PROSTATE CANCER.....	228
PROSTATE CANCER (CONTINUED)	229
PROSTATE CANCER (CONTINUED)	230
PROSTATE CANCER (CONTINUED)	231
PROSTATE CANCER (CONTINUED)	232
PROSTATE CANCER (CONTINUED)	233
STOMACH CANCER.....	234
STOMACH CANCER (CONTINUED)	235
STOMACH CANCER (CONTINUED)	236
TYPES OF STOMACH CANCER.....	237
Types of Stomach Cancer (Continued).....	238
Types of Stomach Cancer (Continued).....	239
CLINICAL TRIALS.....	240
Phase III of Cisplatin/Fluoropyrimidine versus Cisplatin, Fluoropyrimidine, Trastuzumab: ToGA Trial (ClinicalTrials.gov Identifier: NCT01041404)	240
HEAD AND NECK CANCER.....	240
HEAD AND NECK CANCER (CONTINUED)	241
HEAD AND NECK CANCER (CONTINUED)	242
CHAPTER NINE: COMPANIES/GLOBAL PLAYERS.....	243
BIOLOGICS AND COMPANIES	243
<i>TABLE 48 GLOBAL PRESCRIPTION SALES FOR BIOLOGIC DRUGS, THROUGH 2014 (\$ MILLIONS)</i>	243
<i>TABLE 49 SELECTED LEADING BIOTECH COMPANIES BY PIPELINE SIZE, 2008 (%)</i>	244
<i>TABLE 50 LEADING PHARMA COMPANIES BY PIPELINE SIZE, 2008 (%)</i>	245
SELECTED COMPANIES AND PROFILES	246
AMGEN	246
GENZYME CORP.	247
Genzyme Corp. (Continued).....	248
Oncology Drugs.....	249
GLAXOSMITHKLINE	250
JOHNSON & JOHNSON.....	251
MERCK & CO.....	251
NOVARTIS	252
Novartis (Continued).....	253
PFIZER, INC.	254
ROCHE/GENENTECH.....	255
F. Hoffmann-La Roche AG	255
Genentech, Inc.	255

Genentech, Inc. (Continued).....	256
Future Outlook.....	257
Future Outlook (Continued).....	258
Future Outlook (Continued).....	259
Future Outlook (Continued).....	260
SCHERING-PLOUGH	261
Schering-Plough (Continued).....	262
CHAPTER TEN: ISSUES AND TRENDS AFFECTING THE BIOLOGIC	
CANCER MARKET.....	263
MEDICARE AND HEALTHCARE POLICIES.....	263
MEDICARE AND HEALTHCARE ... (CONTINUED)	264
CANCER COST.....	265
CANCER COST (CONTINUED)	266
CANCER DRUG COSTS	267
CANCER DRUG COSTS (CONTINUED).....	268
CANCER DRUG COSTS (CONTINUED).....	269
PERSONALIZED MEDICINE	270
PRICING STRATEGIES FOR CANCER BIOLOGICS.....	271
PRICING STRATEGIES FOR ... (CONTINUED).....	272
PERSONALIZED MEDICINE: USING PHARMACOGENOMICS	273
PERSONALIZED MEDICINE: ... (CONTINUED)	274
PERSONALIZED MEDICINE: ... (CONTINUED)	275
PERSONALIZED MEDICINE: ... (CONTINUED)	276
PERSONALIZED MEDICINE: ... (CONTINUED)	277
PHARMACOGENOMICS.....	278
PHARMACOGENOMICS (CONTINUED)	279
TARGETED CANCER THERAPY	280
TARGETED CANCER THERAPY (CONTINUED).....	281
LIFESTYLES AND CANCER PREVENTION	282
MARKETING AND DISTRIBUTION TRENDS	283
GLOBAL TRENDS	284
GLOBAL TRENDS (CONTINUED).....	285
GLOBAL TRENDS (CONTINUED).....	286
BIOSIMILARS	287
PATENT EXPIRIES AND BIOSIMILARS	288
<i>TABLE 51 FDA APPROVAL AND PATENT EXPIRY DATES FOR</i>	
<i>MAJOR BIOPHARMACEUTICALS (\$ MILLIONS)</i>	289
PATENT EXPIRIES AND BIOSIMILARS (CONTINUED).....	290
BIOSIMILARS AND COST OF CANCER DRUGS.....	291
BIOSIMILARS AND COST OF ... (CONTINUED).....	292
BIOGENERICS, BIOSIMILARS, AND FOBS.....	293
BIOSIMILAR MANUFACTURERS	294
Biosimilar Manufacturers (Continued)	295
BIOGENERICS IN INDIA AND CHINA.....	296

Biogenerics in India and China (Continued).....	297
Biogenerics in India and China (Continued).....	298
HURDLES FOR BIOSIMILARS	299
Hurdles for Biosimilars (Continued)	300
DATA EXCLUSIVITY PERIODS	301
Data Exclusivity Periods (Continued)	302
DIFFERENCES BETWEEN BIOPHARMACEUTICALS AND BIOGENERICS.....	303
Differences Between ... (Continued).....	304
Differences Between ... (Continued).....	305
Differences Between ... (Continued).....	306
Differences Between ... (Continued).....	307
BIOSIMILARS IN EUROPE	308
Biosimilars in Europe (Continued)	309
ISSUES WITH BIOSIMILARS.....	310
ESAS BIOSIMILARS.....	311
BIOSIMILARS AND PATIENT SAFETY.....	312
CURRENT BIOSIMILARS	313
Current Biosimilars (Continued)	314
Current Biosimilars (Continued)	315
SUMMARY	316
CONCLUSIONS	317
VENTURE CAPITAL AND RESEARCH INVESTMENT	318
FUNDING CANCER RESEARCH	319
<i>TABLE 52 GLOBAL INVESTMENT IN CANCER RESEARCH, 2009 (\$</i> <i>MILLIONS)</i>	319
CONCLUSION	320
BIBLIOGRAPHY	321