

## B-Cell Non-Hodgkin's Lymphoma treatment market to stutter to \$5.45 bn by 2024

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The B-cell Non-Hodgkin's Lymphoma (NHL) treatment market is set to rise slowly in value from \$4.38 billion in 2014 to reach \$5.45 billion by 2024, representing a very modest Compound Annual Growth Rate (CAGR) of 1%, according to research and consulting firm GlobalData.

The company's latest report states that such limited growth, which will occur across the seven major markets (7MM) of the US, France, Germany, Italy, Spain, the UK, and Japan, will be hindered by the entry of biosimilars and generics during the forecast period, combined with a weak pipeline.

Dr Cai Xuan, GlobalData's Analyst covering Oncology, says: "The launch of biosimilar rituximab across the 7MM in 2018 will have a significant negative impact on branded drug growth. Also significant will be the impact that generic bendamustine and lenalidomide will have on the treatment space as they are released at various intervals in each region during the forecast period.

"Furthermore, no late-stage drugs in the NHL pipeline are expected to achieve blockbuster status, as rituximab-based chemotherapy regimens are gold-standard therapies that dominate the NHL treatment algorithms across both indolent and aggressive forms of the disease."

The analyst adds that the high clinical efficacy and established reputation of these immunochemotherapies makes developing a replacement therapy in the first-line setting exceedingly difficult.

Dr Xuan continues: "Despite this, there is potential for some of the current pipeline agents to be incorporated into the NHL treatment algorithms across indolent and aggressive lymphomas and in various lines of therapy.

"For example, Roche's Gazyva is being evaluated across the follicular lymphoma and diffuse large B-cell lymphoma settings, while the developers of Arzerra, copanlisib, and duvelisib are focusing on indolent NHL."

GlobalData believes that while new players entering the NHL treatment market must overcome various obstacles, opportunities remain within this segment.

Dr Xuan concludes: "The NHL market is in need of more cost-effective therapeutics, improved consolidation/maintenance therapies for follicular NHL patients, and the development of novel drugs for NHL patients, all of which present significant opportunities for development within this treatment space."