

May 18, 2009



ASCO Snapshot: Colorectal Cancer (CRC)

Event: American Society of Clinical Oncology, May 29—June 2,



Market Leaders

Roche (OTC:RHHBY)/ Genentech: Avastin: 2008 Sales USD 4453m

[Genentech: Avastin may encounter reimbursement difficulties in adjuvant CRC due to use of disease-free survival as primary endpoint in the C-08 trial \(Pharmawire\)](#)

[Genentech's Avastin will likely be reimbursed in the adjuvant setting if the C-08 trial has statistically significant results, physicians say \(Pharmawire\)](#)

[Genentech: Avastin C-08 study primary endpoint measuring three-year DFS may no longer correlate with overall survival in CRC - physicians \(Pharmawire\)](#)

[Genentech's enrollment of Stage II colorectal cancer patients in C-08 trial testing Avastin as adjuvant CRC therapy is controversial, physicians say \(Pharmawire\)](#)

[Genentech's Avastin may face limited use in certain patient sub-populations due to side-effect concerns if C-08 study is approved, physicians say \(Pharmawire\)](#)

[Genentech's Avastin seen as future cornerstone therapy for colorectal cancer despite various setbacks, physicians say \(Pharmawire\)](#)

Bristol Myers Squibb (NYSE:BMJ)/Eli Lilly (NYSE:LLY)/Merck Serono: Erbitux

[Eli Lilly and Amgen: KRAS testing in colorectal cancer sees swift clinical adoption ahead of likely FDA re-labeling of Erbitux and Vectibix \(Pharmawire\)](#)

[Eli Lilly and Amgen's market in colorectal cancer may be further decreased with additional patient stratification by BRAF mutation - analysis \(Pharmawire\)](#)

[Eli Lilly and Amgen's colorectal cancer drugs garner further support for KRAS label revision as recent study shows costs of unnecessary treatment - analysis \(Pharmawire\)](#)

Amgen (NASDAQ:AMGN): Vectibix: 2008 Sales USD 153m

Bayer (OTC:BAYRY)/Onyx (NASDAQ:ONXX): Nexavar: 2008 Sales USD 613m

Roche (OTC:RHHBY)/OSI (NASDAQ:OSIP): Tarceva: 2008 Sales USD 1050m

Pfizer (NYSE:PFE): Sutent: 2008 Sales USD 847m



Unpartnered Targets in Development

Nektar Therapeutics (NASDAQ:NKTR): NKTR-102: market cap USD 553.46m

Poniard (NASDAQ:PARD): picoplatin: market cap USD 118m

[Poniard's picoplatin in early stage development for metastatic colorectal cancer may experience difficulties competing with oxaliplatin, physicians say \(Pharmawire\)](#)

Oncolytics (NASDAQ:ONCY): Reolysin: market cap USD 70.17m

Oxford Biomedica (LON:OXB): TroVax: market cap USD 53.95m

AVEO Pharmaceuticals (Private): AV-951: raised 53m in Series D Financing May 2007

Light Sciences Oncology (private): Light Infusion Therapy: raised 40.1m in Series C Financing July 2008

[Light Sciences Oncology in final stages of negotiations to partner Litx; deal to be announced by fall, CEO says \(Pharmawire\)](#)