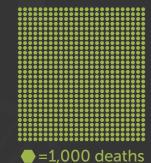
VHR

Liver Cancer, or Hepatocellular carcinoma, is the third most common cause of cancer death, yet there is only one approved systemic therapy available. High unmet need has created a demand in the development pipeline.

A Deadly Disease



Liver Cancer accounts for

deaths annually. That's the population of a city the size of Charlotte, NC.

most

common

cancer

among

women

most common cancer among men

3. Colon

4. Stomach

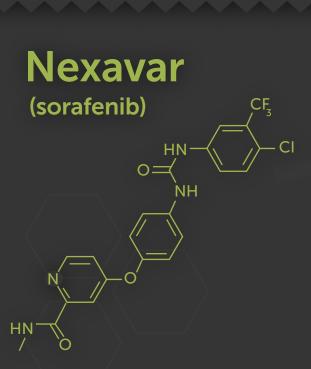
5. Liver

6. Oesophagus

7. Ovary

8. Liver

3RD MOST COMMON CAUSE OF CANCER DEATH.



available for liver cancer, but it has a few drawbacks: Only approved for patients

Sorafenib is the only drug

- with well-preserved liver function and advanced, unresectable tumors Reduces in effectiveness over
- time as patients develop resistance to the treatment Increases median survival rate
- from 6 months to 11 months

High Unmet Need

survival rates

Poor

significant comorbidities

Presence of

treatment options.

Lack of

effective

Late

diagnosis

200,000 people

Orphan Diseases, like Liver Cancer, either affect fewer than

Orphan Disease

research for these rare diseases.

people in the U.S. each year, or are not expected to recover the costs of developing and marketing a treatment drug. The FDA provides grants to fund clinical

all of which are somewhere within Phase III.

Development Pipeline

Bayer and Ony

There are 10 drugs in the later stages of the development pipeline,

Light Sciences Oncology

Light Sciences Biotech

Light Ned Novartis Croup

Rowardule and Dailchi Sankyo

Rowardule and Pharma

Light Ned Novartis Croup

Rowardule and Pharma

R

Phase III Recruitment

Phase I Complete

Phase II Complete

Phase III Ongoing

Complete

Phase III

Accessed through website: Eyasu H. Teshale http://wwwnc.cdc.gov/travel/yellowbook/2012/chapter-3-infectious-diseases-related-to-travel/hepatitis-b.htm#2403

Sources [1] EASL-EORTC Clinical Practice Guidelines: Management of hepatocellular carcinoma. Journal of Hepatology 2012 vol.

56 i 908-943 [2] Centers for Disease Control and Prevention. Yellow Book 2012 (CDC Health Information for International Travel).

[3] Centers for Disease Control and Prevention. Yellow Book 2012 (CDC Health Information for International Travel). Accessed through website: Scott Holmberg http://wwwnc.cdc.gov/travel/yellowbook/2012/chapter-3-infectious-diseases-related-to-travel/hepatitis-c.htm

[4] Singh S, Singh PP, Singh AG, Murad MH, Sanchez W. Am J Gastroenterol. 2013 Feb 5. Anti-Diabetic Medications and the Risk of Hepatocellular Cancer: A Systematic Review and Meta-Analysis.

Worldwide: IARC CancerBase No. 10 [Internet]. Lyon, France: International Agency for Research on Cancer; 2010. Available from: http://globocan.iarc.fr. [6] American Cancer Society. Cancer Facts and Figures 2013. Accessed through website:

http://www.cancer.org/acs/groups/content/@epidemiologysurveilance/documents/document/acspc-036845.pdf

[5] Ferlay J, Shin HR, Bray F, Forman D, Mathers C and Parkin DM. GLOBOCAN 2008 v2.0, Cancer Incidence and Mortality

Industry Standard Research is the premier, full service market research provider to the pharma and pharma services industries. With over a decade of experience in the industry, ISR delivers an unmatched level of domain expertise. For more information about our off-the-shelf please visit our Web site at www.ISRreports.com, email info@ISRreports.com, or follow us on twitter @ISRreports.



www.ISRreports.com