

# Tracking major changes in the R&D pipeline

## Therapeutic area and sponsor trends call for new strategies

**A** new CenterWatch analysis finds that growth in therapeutic areas has shifted during the past five years, with rheumatoid arthritis and psoriasis showing increased levels of activity. And sponsorship of the pipeline has changed significantly, as small biopharmaceutical companies now sponsor the majority of R&D activity.

The new analysis, which features data from CenterWatch's Drugs in Clinical Trial Database, has significant implications for CROs and investigative sites going forward. Industry professionals need to constantly monitor information about how the pipeline is changing and see where top opportunities will emerge in order to survive in a competitive environment. Companies that don't anticipate changes in therapeutic focus, or that continue to work only with the largest pharma companies, could miss out on these new prospects.

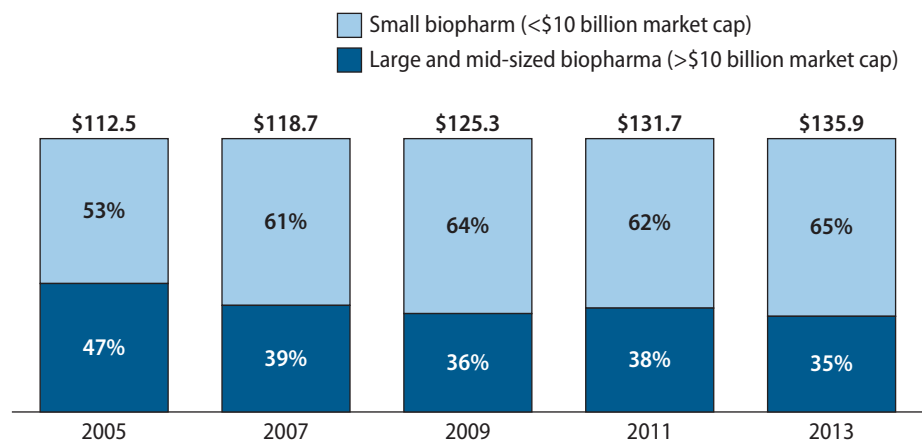
In particular, CenterWatch's analysis provides important information to industry professionals developing strategic plans and trying to determine where their companies need to build or acquire capabilities as opportunities for activity shift.

Forward-looking organizations already have begun to anticipate pipeline and sponsorship changes and have developed new capabilities to take advantage of upcoming opportunities.

"We are always trying to anticipate what the needs of our sponsors and investigators will be, depending on what is coming through from

### Distribution of global drug development spending

In U.S. billions



Source: CenterWatch

the pipelines and what kind of capabilities may be necessary," said Christopher Cabell, M.D., senior vice president, global head of therapeutic delivery at Quintiles.

CenterWatch, which has monitored pipeline activity through its Drugs in Clinical Trial Database for the past 13 years, draws on its database of more than 4,100 drugs—those that have completed development or currently are in clinical trials—to shed light on how activity is changing and the implications of this shift for researchers, CROs and sponsors in the near future.

### Shift in pipeline activity

The analysis shows oncology remains the most dynamic therapeutic

area, representing 18% of active commercial Investigational New Drugs (INDs) in 2012, and has among the highest number of trials in phases II and III. The FDA approved 63 oncology drugs over the past five years, more than medicines in any other therapeutic area. Small cell lung cancer and various lymphomas continue to drive intense competition for new cancer drugs.

Neurology shows continued activity, comprising nearly 8% of commercial INDs in 2012, yet growth in this area was flat last year. In addition, INDs for musculoskeletal and dermatology development both have grown around 9% in the past five years, as research in oncology and inflammation has allowed new therapies to be developed across a variety of diseases.