

1 THE FUTURE OF ONCOLOGY

- ADCs**
Next-gen payloads changing the treatment paradigm
- BISPECIFIC ANTIBODIES**
The next wave of immunotherapy
- RADIO LIGAND THERAPY**
Precision targeting with therapeutic isotopes
- CELL & GENE THERAPY**
Transforming refractory cancers
- PRECISION ONCOLOGY**
Biomarkers, AI & data driving better outcomes

2026-2032

Global Pipeline Drug Market Forecast & Strategic Landscape

Precision. Innovation. Intelligence. Impact.



Prepared by Medifirm Intelledge Global Private Limited
<https://medfirmintelledgeglobal.com>
support.mediii@medfirmintelledgeglobal.com

3 TIME TO MARKET & COMMERCIAL OPPORTUNITY (2026-2032)

	2026	2027	2028	2029	2030+
EXPECTED LAUNCHES	- New ADCs (T-DXd, SKB264) - Bispecific Antibodies - PI3K / AKT Inhibitors - Novel CAR-T Approvals	- First-line Immunotherapy - Combinations - Novel Targets (KRAS G12C, HER2-low) - Additional Radioligand Approvals	- Next-gen ADCs - Multi-specific Antibodies - Expanded CAR-T Indications - mRNA Cancer Vaccines	- Personalized Combination Therapies - Novel Immune Modulators - Radioligand Expansion into Solid Tumors	- AI-guided Therapy Selection - Neoantigen Vaccines - Cell Therapy Combinations - Precision Oncology Platforms
COMMERCIAL OPPORTUNITY	HIGH	VERY HIGH	VERY HIGH	VERY HIGH	TRANSFORMATIONAL
PROBABILITY OF SUCCESS	MODERATE	HIGH	HIGH	VERY HIGH	HIGH
COMMERCIAL READINESS	EARLY	GROWING	ADVANCING	STRONG	LEADING
PATENT OPPORTUNITY	HIGH	HIGH	HIGH	MODERATE	MODERATE
PEAK SALES POTENTIAL (Per Asset)	\$1B - \$3B	\$2B - \$5B	\$3B - \$7B	\$5B - \$10B+	\$5B - \$15B+

COMPETITIVE POSITIONING MATRIX

LEADER
Strong clinical data, market readiness, differentiated technology

EMERGING LEADER
Promising data, strong pipeline, scaling capabilities

DISRUPTOR
Novel mechanism, high potential, early traction

HIGH RISK
Limited data, high competition, execution risk

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5 EXECUTIVE TAKEAWAYS

“The winners of oncology will not be those with the biggest pipelines, but those that integrate precision medicine, AI, biomarkers, companion diagnostics, and global commercialization into a unified strategy.”

HOW TO WIN IN THE ONCOLOGY MARKET (STRATEGIC ACTIONS)

INVEST IN ADC PLATFORMS
Build differentiated payloads & expand into earlier lines of therapy

EXPAND BISPECIFIC PORTFOLIO
Target multiple pathways & tumor microenvironment simultaneously

DEVELOP COMPANION DIAGNOSTICS
Enable precision patient selection & better outcomes

BUILD AI-POWERED PATIENT IDENTIFICATION
Use real-world data & AI models to identify right patients faster

ACCELERATE MARKET ACCESS
Demonstrate value, real-world evidence & early payer engagement

FOCUS ON BIOMARKER-LED COMMERCIALIZATION
Biomarker-driven labels ensure stronger adoption & premium pricing

2 CURRENT ONCOLOGY MARKET LANDSCAPE (2026)



TOP ONCOLOGY COMPANIES BY PIPELINE STRENGTH

ONCOLOGY THERAPY MODALITIES - PIPELINE DISTRIBUTION

ADCs	Bispecific Antibodies	Cell & Gene Therapy	Radioligand Therapy	Small Molecules	mRNA & Vaccines	Others
28%	24%	14%	12%	12%	6%	4%

Source: ClinicalTrials.gov, Evaluate Pharma, Company Pipelines

MAJOR ONCOLOGY THERAPY AREAS - PIPELINE HEAT MAP

Indication	ADC	Bispecific	Cell & Gene	Radioligand	Small Molecule	mRNA / Vaccines
Lung Cancer (NSCLC)	Very High	High	Moderate	Early	Low	Low
Breast Cancer	Very High	High	Moderate	Early	Low	Low
Colorectal Cancer	Very High	High	Moderate	Early	Low	Low
Multiple Myeloma	Very High	High	Moderate	Early	Low	Low
Prostate Cancer	Very High	High	Moderate	Early	Low	Low
Ovarian Cancer	Very High	High	Moderate	Early	Low	Low
Gastric Cancer	Very High	High	Moderate	Early	Low	Low
Lymphoma (B-cell)	Very High	High	Moderate	Early	Low	Low
Leukemia	Very High	High	Moderate	Early	Low	Low
Glioblastoma	Very High	High	Moderate	Early	Low	Low

Legend: Very High (Red), High (Orange), Moderate (Yellow), Early (Green), Low (Grey)

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4 STRATEGIC COMPETITIVE INTELLIGENCE & WINNER MATRIX



WINNER MATRIX (2026-2032)

Company	Platform Strength (Technology & Pipeline)	Commercial Readiness	Global Access & Market Presence	Probability of Commercial Success
MERCK	★★★★★	★★★★★	★★★★★	HIGH
AstraZeneca	★★★★★	★★★★★	★★★★★	HIGH
Roche	★★★★★	★★★★★	★★★★★	HIGH
Daiichi-Sankyo	★★★★★	★★★★★	★★★★★	HIGH
Pfizer	★★★★★	★★★★★	★★★★★	MEDIUM - HIGH
GILEAD	★★★★★	★★★★★	★★★★★	MEDIUM
abbvie	★★★★★	★★★★★	★★★★★	MEDIUM
NOVARTIS	★★★★★	★★★★★	★★★★★	MEDIUM
Bristol Myers Squibb	★★★★★	★★★★★	★★★★★	MEDIUM
Johnson & Johnson	★★★★★	★★★★★	★★★★★	MEDIUM

STRATEGIC INSIGHTS

- ADCs ARE REPLACING CHEMOTHERAPY**
Higher efficacy, better safety, broader tumor coverage. ADCs are moving earlier in the treatment algorithm.
- BISPECIFICS ARE REPLACING CHECKPOINT MONOTHERAPY**
Dual pathway targeting enhances response rates & overcomes immune resistance.
- RADIOLIGANDS ARE THE FASTEST GROWING SEGMENT**
Theranostics enables precision selection & targeted killing of cancer cells with minimal toxicity.
- AI + BIOMARKERS WILL RESHAPE COMMERCIALIZATION**
AI-driven patient identification, trial design, real-world data & predictive analytics will be key differentiators.
- PLATFORM STRATEGY WILL DETERMINE THE WINNERS**
Integrated platforms (drug + diagnostic + digital) will capture long-term value & market leadership.

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