

Oncology Drugs- Market Insights, Competitive Landscape and Market Forecast–2027

<https://marketpublishers.com/r/OFDDC0808626EN.html>

Date: July 2022

Pages: 100

Price: US\$ 2,750.00 (Single User License)

ID: OFDDC0808626EN

Abstracts

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Oncology Drugs Market By Therapy Type (Chemotherapy, Hormonal Therapy, Targeted Therapy [Gene Therapy And Immunotherapy], And Others), By Cancer Type (Breast Cancer, Lung Cancer, Prostate Cancer, Blood Cancers, And Others), By End User (Hospitals, Specialty Clinics, And Others), and by geography is estimated to grow at a healthy CAGR forecast till 2026 due to rising prevalence of various cancers such as lung and breast cancers and growing demand for targeted therapies for cancer treatment

Global oncology drugs market was valued at USD 179.96 Billion in 2021, growing at a CAGR of 12.74% during the forecast period from 2022 to 2027, in order to reach USD 368.22 Billion by 2027. The oncology drugs market is witnessing a positive market growth owing to the factors such as rising prevalence of various cancers such as lung cancer which accounted for the highest number of cancer-related deaths and highest cancer incidence in 2021, and presence of factors such as growth in aging population wherein age plays a key role in cancer development in certain cancer types such as prostate and breast cancers. Moreover, the growing focus on developing targeted therapies such as CAR-T cell therapies to provide a more pronounced therapeutic effect is further driving the oncology drugs market as new products are gaining regulatory approvals for cancer treatment.

Oncology Drugs Market Dynamics:

One of the key aspects driving the oncology drugs market can be attributed to the surge in cancer incidence. The GLOBOCAN study conducted by the International Agency for

Research on Cancer mentioned that in 2020, an estimated number of 19.3 million new cancer cases (18.1 million excluding non-melanoma skin cancer) and approximately 10.0 million cancer deaths were reported globally. The source mentioned above also stated that in 2020, lung cancer was the main cause accounting for the highest number (1.4 million) of cases followed by prostate (14.1%), colorectum (10.6%), stomach (7.1%), and liver (6.3%) cancers. Cancer, being a debilitating disease, requires extensive treatment in order to treat cancerous cells. Even though not all cancer would require treatment, most of them do. Various therapies such as chemotherapy, gene therapy, and immunotherapy are employed in cancer treatment due to the benefits associated with them in terms of providing curative as well as palliative effect in cancer treatment. Thus, the growing need for oncology drugs of various types can be attributed to the increasing cancer incidence which may respond to different therapy types. Therefore, all the aforementioned factors are projected to contribute to the growing demand for oncology drugs, ultimately boosting the growth of the global oncology drugs market.

Considering the increasing incidence of cancers, most of the pharmaceutical companies are focusing on extensive research and development activities in the oncology domain. This has resulted in more products being launched in the market. For instance, the US Food and Drug Administration (FDA) granted the regulatory approval for their supplemental new drug application for BRUKINSA (zanubrutinib) in Chronic Lymphocytic Leukemia. In another example, in May 2021, the US FDA approved Johnson & Johnson's infused therapy Rybrevant for the treatment of non-small cell lung cancer with a certain mutation to a cancer protein called epidermal growth factor.

However, potential side-effects associated with different cancer therapies such as loss of bone mass and cost of oncology drugs especially in low- and middle-income countries may prove to be challenging factors for oncology drugs market growth.

The oncology drugs market was negatively impacted by the implementation of measures to curb the spread of the COVID-19 infection. In order to cater to the exigency created by the COVID-19 pandemic, all other medical specialties witnessed a reduction in patient load. For instance, according to Cancer Research UK, in the UK alone, urgent lung cancer referrals fell up to 75% during the first lockdown. This did not correlate to the decrease in cases, but that fewer people sought and obtained the diagnosis they urgently needed. Unfortunately, these trends were prominent across countries around the globe. Nevertheless, the market for oncology drugs is on a period of recovery owing to devising of strategies to transform cancer care thereby presenting a future outlook for oncology drugs market during the forecast period from 2022-2027.

Oncology Drugs Market Segment Analysis:

Oncology Drugs Market by Therapy Type (Chemotherapy, Hormonal Therapy, Targeted Therapy [Gene Therapy and Immunotherapy], and Others), by Cancer Type (Breast Cancer, Lung Cancer, Prostate Cancer, Blood Cancers, and Others), by End User (Hospitals, Specialty Clinics, and Others), and by Geography (North America, Europe, Asia-Pacific, and Rest of the World)

In the therapy type segment of the oncology drugs market, the targeted therapy category is estimated to account for a prominent revenue share in market during the forecast period (2022-2027). This can be attributed to the advantages associated with targeted therapy. Owing to its specificity in targeting proteins and genes of interest and providing better prognostic outcomes in terms of eliminating cancer cells, targeted therapy is being preferred as the choice of treatment in oncology. One of the key aspects associated with cancer cells is the ability to evade immune system checkpoints; targeted therapy helps in marking cancer cells enabling in their identification by the immune system thereby helping in their destruction.

Considering the advantages associated with targeted therapy, there are currently over 900 applications with the US Food and Drug Administration to investigate gene therapy in clinical trials. This has also resulted in an increased number of product approvals in the market. For instance, in March 2021, the US FDA approved the idecabtagene vicleucel (Abecma) for the treatment of multiple myeloma in patients with relapsed or treatment-resistant myeloma.

Thus, owing to the factors stated above, this therapy category is expected to witness a considerable growth eventually contributing the overall growth of the global oncology drugs market in the forecast period.

North America is expected to dominate the overall Oncology Drugs Market:

Among all the regions, North America is estimated to amass the largest revenue share in the global oncology drugs market. This can be ascribed to the high prevalence of cancers, and a supportive regulatory environment among other factors in the region. Furthermore, high disposable income, sophisticated healthcare infrastructure, and increased awareness regarding new treatments coupled with extensive insurance coverage for these treatments are also expected to aid in the oncology drugs market growth in this region.

One of the key supporting factors for the growth of the North America oncology drugs market is the increasing prevalence of cancers in the United States. As per the figures mentioned by the American Cancer Society, in 2021, it was estimated that 1.9 million new cancer cases would have been diagnosed in the United States. The data provided by the Centers for Disease Control and Prevention (2021), in 2018, 1,708,921 new cases of cancers were reported. For instance, the American Cancer Society estimates that in 2022, approximately 287,850 new cases of invasive breast cancer are expected to be diagnosed in women in the United States. Therefore, the increasing incidence of cancers such as breast cancer along with other cancer types in the country is expected to further drive the demand for oncology drugs thereby contributing in the growth of the United States oncology drugs market along with the overall growth of the North America oncology drugs market.

Furthermore, as the demand for targeted therapies in cancer treatment is witnessing an increase, there has been a major focus on extensive research and development in translation research leading to the development of new therapies as well as product approvals for the same. For instance, in September 2021, Health Canada approved LUMAKRAS™ (sotorasib) – the first and only targeted treatment for patients with KRAS G12C-mutated locally advanced or metastatic non-small cell lung cancer. Similarly, in May 2020, the US Food and Drug Administration granted regulatory approval for the treatment of adult patients with non-small cell lung cancer (NSCLC) that has spread to other parts of the body.

Thus, such product development activities along with other contributing factors such as the presence of a robust healthcare system and insurance coverage are further driving the demand for oncology drugs in the North American region.

Oncology Drugs Market Key Players:

Some of the key market players operating in the oncology drugs market includes GlaxoSmithKline, Eli Lilly & Company, F. Hoffmann-La Roche Ltd, AbbVie Inc., Amgen Inc., Sanofi, Merck & Co., Inc, Novartis AG, Pfizer Inc, AstraZeneca, Bristol Myers Squibb., Gilead Sciences, Inc., Janssen Global Services, LLC, BAYER AG., Celldex Therapeutics Inc., Alamos Therapeutics, Inc., Astellas Pharma Inc., Genentech, Inc., Sandoz International GmbH, and BeiGene others.

Recent Developmental Activities in Oncology Drugs Market:

In October 15, 2021, the US FDA approved atezolizumab (Tecentriq) by Genentech, Inc. for adjuvant treatment following resection and platinum-based chemotherapy in patients with stage II to IIIA non-small cell lung cancer (NSCLC).

In August 2021, Bristol Myers Squibbs received the conditional marketing authorization for Abecma (idecabtagene vicleucel) by the European Commission for the treatment of adult patients with relapsed and refractory multiple myeloma. It is a first-in-class B-cell maturation antigen (BCMA)-directed chimeric antigen receptor (CAR) T cell immunotherapy.

In April 2021, Sanofi announced the acquisition of Tidal Therapeutics which is involved in the development of mRNA-based research platform. This acquisition will help Sanofi utilize this technology platform to expand their capabilities in the field of immunology and oncology.

Key Takeaways from the Oncology Drugs Market Report Study

Market size analysis for current oncology drugs market size (2021), and market forecast for 5 years (2022-2027)

The effect of the COVID-19 pandemic on this market is significant. To capture and analyze suitable indicators, our experts are closely watching the oncology drugs market.

Top key product/services/technology developments, merger, acquisition, partnership, joint venture happened for last 3 years

Key companies dominating the global oncology drugs market.

Various opportunities available for the other competitors in the oncology drugs market space.

What are the top performing segments in 2021? How these segments will perform in 2027.

Which is the top-performing regions and countries in the current oncology drugs market scenario?

Which are the regions and countries where companies should have concentrated on opportunities for oncology drugs market growth in the coming future?

Target Audience who can be benefited from this Oncology Drugs Market Report Study

Oncology drugs products providers

Research organizations and consulting companies

Oncology drugs -related organizations, associations, forums, and other alliances

Government and corporate offices

Start-up companies, venture capitalists, and private equity firms

Distributors and Traders dealing in oncology drugs

Various End-users who want to know more about the oncology drugs market and latest technological developments in the oncology drugs market.

Frequently Asked Questions for Oncology Drugs Market:

1. What is Oncology Drugs?

Oncology drugs encompasses all kinds of cancer treatments such as chemotherapy, radiation therapy, hormonal therapy and targeted therapy among others that aim to kill cancer cells to provide therapeutic effect.

2. What is the global market for Oncology Drugs?

Global oncology drugs market was valued at USD 179.96 Billion in 2021, growing at a CAGR of 12.74% during the forecast period from 2022 to 2027, in order to reach USD 368.22 Billion by 2027.

3. What are the drivers for Global Oncology Drugs Market?

The oncology drugs market is witnessing a positive market growth owing to the factors such as rising prevalence of cancers such as lung cancer which are contributing in the growing demand for cancer treatment, and presence of factors such as increasing aging population wherein age plays a key role in cancer development in certain cancer types such as breast cancer. Moreover, the growing focus on developing targeted therapies to provide a more pronounced therapeutic effect is further driving the oncology drugs market as new products are gaining regulatory approvals for cancer treatment.

4. Who are the key players operating in Global Oncology Drugs Market?

Some of the key market players operating in the oncology drugs market includes GlaxoSmithKline, Eli Lilly & Company, F. Hoffmann-La Roche Ltd, AbbVie Inc., Amgen Inc, Sanofi, Merck & Co., Inc, Novartis AG, Pfizer Inc, AstraZeneca, Bristol Myers Squibb., Gilead Sciences, Inc., Janssen Global Services, LLC, BAYER AG., Celldex Therapeutics Inc., Alamos Therapeutics, Inc., Astellas Pharma Inc., Genentech, Inc., Sandoz International GmbH, and BeiGene others.

5. Which region has the highest share in Oncology Drugs Market?

North America is expected to hold the highest share in the revenue in the Oncology Drugs market during the forecast period. This can be ascribed to the high prevalence of cancers, and a supportive regulatory environment among other factors in the region. Furthermore, high disposable income, sophisticated healthcare infrastructure, and increased awareness regarding new treatments coupled with extensive insurance coverage for these treatments are also expected to aid in the oncology drugs market growth in this region.

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