

# Global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) market size is expected to reach \$ 26465 million by 2032, rising at a market growth of 15.4% CAGR during the forecast period (2026-2032).

PARP inhibitors are a class of targeted anticancer agents that inhibit poly (ADP-ribose) polymerase enzymes involved in single-strand DNA repair. By blocking PARP activity, they induce accumulation of DNA damage and exploit homologous recombination deficiency (HRD), particularly in BRCA1/2-mutated tumors, leading to synthetic lethality and selective tumor cell death. They represent a key modality in precision oncology.

Nominal capacity is constrained by innovative drug manufacturing systems, translating into less than 100 tons of combined API and formulation capacity, reflecting a high-value, low-volume profile. Mechanistically, these agents inhibit PARP-mediated single-strand DNA repair and induce synthetic lethality in BRCA- or HRD-deficient tumors, forming an oligopolistic structure led by Olaparib under AstraZeneca, with Niraparib and Talazoparib as key complements and Chinese agents Fluzoparib and Pamiparib providing price-tier differentiation. The classification framework includes six commercial molecules and biomarker-based segmentation into BRCA, HRD, and all-comer populations; on the application side, combination regimens have become the dominant growth driver, with PARP+AR and PARP+IO enabling indication expansion, where ovarian cancer remains the core base at around 50% while prostate cancer represents the fastest-growing segment with share exceeding 30%. Pricing shows strong regional divergence, with annual therapy costs of USD 120k–180k per patient in the US and Europe versus USD 20k–50k in China, implying a global blended price of USD 100k–120k per patient and gross margins typically at 85–92%. Upstream consists of

small-molecule APIs and advanced CDMO systems, while downstream includes oncology hospitals and BRCA/HRD companion diagnostics, resulting in a highly concentrated global structure with the top three players accounting for over 80% alongside rapid penetration of domestic Chinese alternatives. Overall, the industry has transitioned from a target-driven phase to one driven by indication expansion and combination regimens, with growth primarily fueled by prostate cancer expansion and combination adoption, while key uncertainty lies in variable PARP+IO efficacy and potential substitution by next-generation DDR targets.

This report studies the global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) total production and demand, 2021-2032, (Tons)

Global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) total production value, 2021-2032, (USD Million)

Global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) domestic production, consumption, key domestic manufacturers and share

Global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include AstraZeneca, GlaxoSmithKline?GSK?, Pfizer, Bristol Myers Squibb?BMS?, Jiangsu Hengrui Pharmaceuticals, BeiGene, Johnson & Johnson, Merck & Co., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) Market, Segmentation by Type:

Olaparib

Niraparib

Talazoparib

Rucaparib

Fluzoparib

Pamiparib

Global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) Market, Segmentation by Patient:

BRCA-mutated

HRD-positive Broader Population

All-comers

Global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) Market, Segmentation by Application:

Ovarian Cancer

Breast Cancer

Prostate Cancer

Pancreatic Cancer

Other HRD tumors

Companies Profiled:

AstraZeneca

GlaxoSmithKline?GSK?

Pfizer

Bristol Myers Squibb?BMS?

Jiangsu Hengrui Pharmaceuticals

BeiGene

Johnson & Johnson

Merck & Co.

Key Questions Answered:

1. How big is the global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) market?
2. What is the demand of the global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) market?
3. What is the year over year growth of the global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) market?
4. What is the production and production value of the global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) market?
5. Who are the key producers in the global Poly ADP-ribose Polymerase Inhibitors(PARP Inhibitors) market?
6. What are the growth factors driving the market demand?

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