

Urothelial Cancer Drugs Market Size, Share & Trends Analysis Report By Treatment Class (Chemotherapy, Immunotherapy), By Major Markets, Competitive Landscape, And Segment Forecasts, 2018 - 2023

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Abstracts

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The global urothelial cancer drugs market size is expected to reach USD 3.6 billion by 2023, as per a new report by Grand View Research, Inc., exhibiting a 22.9% CAGR during the forecast period. Availability of novel drugs, presence of a strong pipeline, rising disease incidence, unhealthy lifestyle, and increasing awareness are driving this market.

Urothelial cancer is the ninth most common malignancy in the world, with approximately 2.5 million patients and 420,000 newly diagnosed cases each year. Approximately 59% of bladder cancer cases occur in developed regions such as North America and Europe. The disease has the highest lifetime cost of care per patient among all tumors in U.S. due to its high relapse rate and invasive lifelong monitoring including cystoscopy follow-ups.

Bladder transitional cell carcinoma (TCC) is the most common histology, accounting for nearly 90% of all urinary cancer cases. Urothelial cancer is clinically divided into three categories: non-muscle invasive bladder cancer (NMIBC, early stage), muscle invasive disease (MIBC, mid stage), and metastatic disease (late stage). At diagnosis, approximately 70% of cases are non-muscle invasive disease, 20% are at the muscle invasive stage, and 10% are at the advanced stage.

Further key findings from the report suggest:

The U.S. dominated the urothelial cancer market, with more than 60% of the market in 2017. Several factors such as presence of a large target population, increased adoption of novel therapeutics, and multiple product launches will drive the market in this region

The therapeutic landscape is expected to witness a paradigm shift toward combination therapies and novel immuno-oncology products. Combination regimens, particularly checkpoint inhibitors, are likely to be introduced in the first-line setting. Immune checkpoint blockade therapy is expected to replace the current standard of care in bladder cancer in the foreseeable future

Therapeutic development in second-line setting for chemotherapy-intolerant patients is expected to have a major impact in the urothelial cancer space

Urothelial cancer presents a strong opportunity for introducing first-in-class treatments due to high unmet needs. Opportunities remain in the non-muscle invasive bladder cancer (NMIBC) setting where there exists an unmet need for treatment options for patients who are BCG-intolerant or ineligible

Some of the key players operating in this market are Roche, Merck, Bristol-Myers Squibb, AstraZeneca, and Pfizer.

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