

Cancer Immunotherapy - A Global Market Overview

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Abstracts

Cancer Immunotherapy Market Trends and Outlook

Cancer immunotherapy, called immuno-oncotherapy, harnesses the body's immune system to identify and eliminate cancer cells. In contrast to traditional therapies like chemotherapy and radiation, which directly target cancer cells, immunotherapy enhances the immune response by utilizing tumor antigens that activate immune recognition. Monoclonal antibodies identify and tag cancer cells for elimination, while immune checkpoint inhibitors enhance the immune system's attack on tumors. Additionally, oncolytic viral therapies and cancer vaccines aim to destroy cancer cells or train the immune system to detect and attack cancer antigens more effectively. The effectiveness of these therapies varies across different cancer types, making them a significant focus in oncology research.

The global market for Cancer Immunotherapy is estimated at US\$135.2 billion in 2024 and is anticipated to post a CAGR of 9.8% during the 2024-2030 analysis period and stand at a projected US\$236.9 billion by 2030.

The global cancer immunotherapy market is primarily driven by the rising prevalence of cancer worldwide, leading to a growing demand for more effective treatment options. Oncolytic viral therapies and cancer vaccines use viruses to specifically target and destroy cancer cells, while Checkpoint inhibitors and CAR-T cell therapies are increasingly employed to treat lung cancer and melanoma. These therapies stimulate immune responses and are gaining attention due to their precise targeting and reduced side effects, further driving market demand. Advancements in biotechnology, including gene editing and bioinformatics, have enabled the development of personalized and efficient therapies. Additionally, investments in research and development and a supportive regulatory environment have accelerated the introduction of innovative treatments.

Cancer Immunotherapy Regional Market Analysis

North America dominates the market and is expected to hold an estimated share of 43.7% in 2024, primarily due to the increasing demand for advanced treatment options, a strong presence of major market players, and substantial investments in research and development. The United States leads this growth with favorable reimbursement policies and advanced healthcare infrastructure, which facilitates the adoption of immunotherapies. On the other hand, the Asia Pacific region is poised to be the fastest-growing market, with a projected CAGR of 11.3% during the forecast period 2024-2030. This growth is driven by a rising population of cancer patients, increased healthcare expenditures, and a growing awareness of innovative therapies in countries such as China and India. Government efforts to enhance healthcare infrastructure and a growing private sector are further driving this expansion, addressing the critical need for effective cancer treatments in both regions.

Cancer Immunotherapy Market Analysis by Product

The Monoclonal Antibodies segment dominates the cancer immunotherapy market, holding a projected share of 55.9% in 2024. This dominance is driven by growing R&D investments in bispecific, conjugated, and naked antigen-binding antibodies, which have created new growth opportunities in oncology therapeutics. These antibodies enhance adaptive immunity and specifically target cancer antigens, resulting in improved therapeutic outcomes with reduced side effects. In contrast, the Oncolytic Viral Therapies and Cancer Vaccines segment is expected to be the fastest-growing, with a projected CAGR of 11.8% during the analysis period 2024-2030, despite facing challenges like immunogenicity and immunosuppression in tumor environments.

Cancer Immunotherapy Market Analysis by Application

The lung cancer application is anticipated to maintain its dominant position by holding the largest market share of 13.8% in 2024. This growth is driven by the increasing prevalence of lung cancer, primarily due to increased smoking and the popularity of harmful products such as e-cigarettes. As the leading cause of cancer-related deaths globally, lung cancer requires immunotherapy treatments to manage the advanced stages of the disease. Meanwhile, the breast cancer application is expected to be the fastest-growing segment, with a projected CAGR of 13.5% during the forecast period 2024-2030, driven by the high prevalence of breast cancer, ongoing research and development efforts, and increased investments by leading players to develop novel

therapeutics. The rising number of breast cancer cases among women globally further fuels this segment's expansion.

Cancer Immunotherapy Market Analysis by End-User

The Hospitals & Clinics segment is the largest end-user market, with an estimated share of 49.8% in 2024, primarily driven by the rising incidence of cancer, increased treatment rates, improved awareness, and the availability of immunotherapy treatments across numerous hospitals. The segment's significance is further strengthened by the growing number of hospital admissions for cancer treatment and the increased adoption of advanced therapies. Conversely, the Cancer Research Centers segment is anticipated to record the fastest growth with a CAGR of 10.9% during the analysis period from 2024 to 2030. This growth is driven by increasing investments in cancer research from corporate and government organizations, along with advancements in immunotherapy treatments.

Cancer Immunotherapy Market Report Scope

This global report on Cancer Immunotherapy analyzes the market based on product, application, and end-users. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics

Historical Period: 2021-2023

Base Year: 2023

Forecast Period: 2024-2030

Units: Value market in US\$

Companies Mentioned: 10+

Cancer Immunotherapy Market by Geographic Region

North America (The United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Italy, Spain, and Rest of Europe)

Asia-Pacific (Japan, China, India, South Korea, and Rest of Asia-Pacific)

South America (Brazil, Argentina, and Rest of South America)

Rest of World

Cancer Immunotherapy Market by Product

Monoclonal Antibodies

Oncolytic Viral Therapies & Cancer Vaccines

Checkpoint Inhibitors & Immunomodulators

Cancer Immunotherapy Market by Application

Lung Cancer

Breast Cancer

Colorectal Cancer

Skin Cancer

Prostate Cancer

Stomach Cancer

Head & Neck Cancer

Others (Including Blood, Ovarian, Cervical, Kidney, Liver, Bladder, Pancreatic, and other cancers)

Cancer Immunotherapy Market by End-User

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Cancer Research Centers

Other End-Users (Including Ambulatory Surgical Centers (ASCs), and
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Bristol-Myers Squibb Company

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