

Lung Cancer Therapeutics – A Global Market Overview

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Abstracts

Lung Cancer Therapeutics Market Trends and Outlook

Lung cancer, also known as lung carcinoma, is a malignant tumor that begins in the lungs and is caused by genetic damage to airway cells from smoking or exposure to harmful chemicals. This uncontrolled cell growth results in the formation of tumors, which can hinder lung function. Early-stage lung cancer often shows no symptoms and is identified through medical imaging, while advanced stages may cause coughing, shortness of breath, or chest pain. Diagnosis requires imaging tests and a biopsy for classification. There are two main types: small cell lung cancer (SCLC), accounting for about 15% of cases and known for its aggressive nature and rapid spread to other organs, and non-small cell lung cancer (NSCLC), which makes up approximately 85% of cases and grows more slowly.

The global market for Lung Cancer Therapeutics is estimated at US\$32.5 billion in 2024 and is anticipated to record a CAGR of 10.4% during the 2024-2030 analysis period and stand at a projected US\$58.9 billion by 2030. Treatment options for lung cancer vary depending on the type and stage of the disease and may include surgery, chemotherapy, immunotherapy, and radiation therapy, either alone or in combination. Targeted therapies inhibit tumor growth, while immunotherapies enhance the body's immune response. Chemotherapy is used to decrease or eliminate tumors, and radiation therapy uses high-energy X-rays for treatment. In addition, researchers are exploring new methods, such as photodynamic therapy (PDT), which uses light and drugs to destroy cancer cells. Early detection is crucial, as symptoms often appear after the cancer has advanced, making treatment more challenging.

The lung cancer therapeutics market is driven by increased awareness and

advancements in screening technologies that facilitate early detection, enabling timely and effective treatment. Additionally, the rising prevalence of lung cancer, an aging population, and lifestyle changes contribute to a long-term demand for effective therapies. Innovations such as targeted therapies and immunotherapies enhance patient outcomes while minimizing side effects, with a growing emphasis on personalized medicine for individual genetic profiles. Cancer risk is further increased by environmental pollution, while improved detection methods and treatments like chemotherapy and surgery contribute to better outcomes. The market expansion is further driven by rising healthcare spending, increased access to therapies, and growing demand for targeted therapies that enhance quality of life, especially as the global population ages.

Lung Cancer Therapeutics Regional Market Analysis

In 2024, North America leads the global lung cancer therapeutics market with a share of approximately 43%, driven by the increasing prevalence of lung cancer, advancements in diagnostics, and the presence of biopharmaceutical companies. Improved access to expensive treatments is encouraged by widespread health insurance, robust healthcare infrastructure, and proactive FDA approvals that boost market growth. The region's large elderly population and high smoking rates further increase demand for therapeutics. On the other hand, the Asia Pacific region is projected to record the fastest CAGR of 12.2% during the analysis period 2024-2030, fueled by rising smoking rates and exposure to secondhand smoke. Government investments in healthcare and expanded insurance coverage have enhanced access to care, and leading biopharmaceutical companies are improving manufacturing capabilities to produce advanced drugs at lower costs. Key drivers in the Asia Pacific market include a growing patient population, increased lung cancer awareness, and government initiatives to reduce the disease burden.

Lung Cancer Therapeutics Market Analysis by Cancer Type

The lung cancer therapeutics market in 2024 is dominated by the non-small cell lung cancer (NSCLC) type, which holds an estimated 85.3% share due to its high prevalence and the development of targeted therapies and immunotherapies. These advancements specifically target genetic mutations such as EGFR, ALK, and ROS1, providing personalized treatment options and improving patient outcomes with immune checkpoint inhibitors like pembrolizumab and nivolumab. Conversely, the small cell lung cancer (SCLC) segment is anticipated to register the fastest CAGR of 11% during the forecast period 2024-2030, driven by increasing smoking rates and greater awareness

of available treatments. While traditional SCLC therapies primarily consist of chemotherapy and radiotherapy, the introduction of new treatments like immune checkpoint inhibitors is beginning to improve survival rates, leading to a surge in global demand for lung cancer therapeutics.

Lung Cancer Therapeutics Market Analysis by Therapy Type

Targeted therapy is the largest market for lung cancer therapeutics, with an estimated share of 47.4% in 2024 due to its ability to effectively target cancer cells while sparing normal cells, leading to reduced side effects and lower recurrence rates. The growth of the biopharmaceutical industry and increased investments in research and development have led to significant advancements in targeted therapeutics, specifically addressing genetic or molecular abnormalities in tumors. This precision in targeting has notably improved treatment effectiveness and the quality of life for patients. Additionally, the increasing healthcare expenditures and awareness of advanced gene therapies have driven the demand for targeted treatments. Meanwhile, immunotherapy is expected to be the fastest-growing segment, with a CAGR of 12.3% during the analysis period. This approach leverages the immune system to identify and eliminate cancer cells, gaining popularity among patients as an innovative method to effectively combat lung cancer.

Lung Cancer Therapeutics Market Analysis by End-User

In 2024, the hospitals segment is estimated to hold a 48% share of the end-user market, driven by the increasing availability of advanced therapies and comprehensive care for complex medical needs. Chemotherapy and targeted therapies are preferred in hospitals because of the constant supervision and a wide range of treatment options, such as surgery, radiation therapy, and immunotherapy, which are supported by multidisciplinary teams and clinical trials. In contrast, the specialty clinics segment is anticipated to experience robust growth, with a projected CAGR of 11.7% during the analysis period 2024-2030, driven by their capability to provide personalized, advanced treatments and focused care for lung cancer patients, often resulting in improved outcomes and experiences.

Lung Cancer Therapeutics Market Report Scope

This global report on Lung Cancer Therapeutics analyzes the market based on cancer type, therapy type, 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: 15+

Lung Cancer Therapeutics 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

Lung Cancer Therapeutics Market by Cancer Type

Non-small cell lung cancer (NSCLC)

Small cell lung cancer (SCLC)

Lung Cancer Therapeutics Market by Therapy Type

Targeted Therapies

Immunotherapy

Chemotherapy

Radiation Therapy

Others (Including Surgery, Photodynamic Therapy (PDT), and Palliative Care)

Lung Cancer Therapeutics Market by End-User

Hospitals

Specialty Clinics

Other End-Users (Including Cancer Research Centers, Ambulatory Surgical Centers (ASCs), and Homecare settings)

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Amgen Inc.

Astellas Pharma Inc.

AstraZeneca plc

Boehringer Ingelheim International GmbH

Bristol-Myers Squibb Company

Eli Lilly and Company

F. Hoffmann-La Roche AG

GSK plc

Johnson & Johnson Innovative Medicine

Merck & Co., Inc.

Novartis AG

Pfizer Inc.

Sanofi S.A.

Takeda Pharmaceutical Company Limited

Teva Pharmaceutical Industries Ltd.

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Targeted Therapy

Immunotherapy

Chemotherapy

Radiation Therapy

Others

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