

Non-Small Cell Lung Cancer (NSCLC) Therapeutics – A Global Market Overview

<https://marketpublishers.com/r/N238BC26DAA4EN.html>

Date: November 2024

Pages: 258

Price: US\$ 4,500.00 (Single User License)

ID: N238BC26DAA4EN

Abstracts

Non-Small Cell Lung Cancer (NSCLC) Therapeutics Market Trends and Outlook

Non-Small cell Lung Cancer (NSCLC) comprises 80% of lung cancer cases, typically growing and spreading more slowly than small cell lung cancer. The primary subtypes of NSCLC include adenocarcinoma, squamous cell carcinoma, and large cell carcinoma. Adenocarcinoma, often located in the outer regions of the lung, accounts for about 40% of lung cancer cases. Squamous cell carcinoma (SCC) is typically found near the bronchus, is strongly associated with smoking, and is commonly diagnosed in men. Large cell carcinoma is a more aggressive subtype that can develop anywhere in the lung, posing significant treatment challenges. Other less common types include adenosquamous and sarcomatoid carcinoma.

The global market for Non-Small Cell Lung Cancer (NSCLC) Therapeutics is estimated at US\$27.7 billion in 2024 and is anticipated to record a CAGR of 10.3% during the 2024-2030 analysis period and stand at a projected US\$50 billion by 2030.

The Non-Small Cell Lung Cancer (NSCLC) therapeutics market is driven by the increasing rates of tobacco consumption, particularly among younger individuals, and also severe air pollution and poor lifestyle choices. As NSCLC represents 80-85% of all lung cancer cases worldwide, the rising incidence of lung cancer is generating a heightened demand for effective therapies. Key risk factors fueling this trend include exposure to carcinogens from smoking and environmental pollutants, coupled with an aging population that has long been affected by tobacco. Progress in cancer detection and treatment methods, including immunotherapy and targeted therapy, is further driving market expansion, along with enhanced research initiatives and backing from both government and private entities.

Non-Small Cell Lung Cancer (NSCLC) Therapeutics Regional Market Analysis

North America leads the global non-small cell lung cancer (NSCLC) therapeutics market with an estimated share of 42.9% in 2024, driven by a robust healthcare system, increased awareness of early diagnosis, favorable reimbursement policies, and key industry players' presence, especially in the U.S. In contrast, the Asia-Pacific region is projected to record the fastest CAGR of 12.1% during the 2024-2030 forecast period, fueled by a large patient base, heightened pharmaceutical R&D, and growing disposable income in countries like China and India. The ongoing expansion of healthcare infrastructure in the region, combined with initiatives to promote cancer awareness and the production of affordable biosimilars and generics by local manufacturers, further boosts the region's market growth.

Non-Small Cell Lung Cancer (NSCLC) Therapeutics Market Analysis by Cancer Type

The adenocarcinoma segment is the largest market for non-small cell lung cancer (NSCLC) therapeutics, accounting for 41% in 2024, due to a significant patient base and various treatment options. This cancer type originates in glandular tissue and is often linked to smoking, with the potential to metastasize to multiple organs, contributing to rising incidence and detection rates. The segment's growth is further supported by the availability of targeted therapies for specific genetic alterations, as well as ongoing research into immunotherapy and combination treatment approaches. In contrast, the squamous cell carcinoma (SCC) segment is projected to be the fastest-growing market with a CAGR of 11.4% during the analysis period 2024-2030, driven by increasing exposure to UV radiation and enhanced awareness initiatives that motivate more patients to pursue treatment.

Non-Small Cell Lung Cancer (NSCLC) Therapeutics Market Analysis by Therapy Type

The targeted therapy segment dominates the NSCLC market, with an estimated share of 39.5% in 2024, due to its clinical advantages like minimal side effects and various treatments available. The move towards precision medicine, which enhances efficacy and tolerability, is leading to a rise in the use of targeted therapies as primary options or combined with chemotherapy and immunotherapy. On the other hand, the immunotherapy segment is expected to record the fastest CAGR of 12.1% during the forecast period 2024-2030, driven by the launch of new products and a growing inclination to utilize the immune system in cancer treatment. This expansion is further bolstered by increased funding from major market players concentrating on creating

optimized treatment solutions.

Non-Small Cell Lung Cancer (NSCLC) Therapeutics Market Analysis by End-User

The hospitals segment holds the majority share of the non-small cell lung cancer therapeutics market, with an estimated 54.6% share in 2024. This dominance is due to their comprehensive care capabilities, advanced facilities, and access to multidisciplinary teams, which provide a full range of complex lung cancer treatments, including inpatient services for chemotherapy and surgeries. In contrast, the specialty clinics segment is projected to register the fastest CAGR of 12% during the analysis period 2024-2030, driven by their focus on advanced therapies like targeted treatments and immunotherapy, which provide personalized care and are increasingly favored by patients for their affordability and access to advanced therapies.

Non-Small Cell Lung Cancer (NSCLC) Therapeutics Market Report Scope

This global report on Non-Small Cell Lung Cancer (NSCLC) 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+

Non-Small Cell Lung Cancer (NSCLC) 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

Non-Small Cell Lung Cancer (NSCLC) Therapeutics Market by Cancer Type

Adenocarcinoma

Squamous cell carcinoma (SCC)

Large cell carcinoma

Other Cancers (Including Adenosquamous Carcinoma and Sarcomatoid Carcinoma)

Non-Small Cell Lung Cancer (NSCLC) Therapeutics Market by Therapy Type

Targeted Therapies

Immunotherapy

Chemotherapy

Radiation Therapy

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

Non-Small Cell Lung Cancer (NSCLC) 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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Large cell carcinoma

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Targeted Therapy

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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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