

# **Head and Neck Cancer Market Assessment, By Therapy Type [Chemotherapy, Immunotherapy, Targeted Therapy] By Route of Administration [Injectable, Oral], By Drug Class [EGFR Inhibitors, Mitotic Inhibitors, Anti-PD-1 Monoclonal Antibodies, Others], By Distribution Channel [Retail and Specialty Pharmacies, Hospital Pharmacies, Online Pharmacies] By Region, Opportunities and Forecast, 2017-2031F**

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## **Abstracts**

Global head and neck cancer market size was valued at USD 2.25 billion in 2023, and is expected to reach USD 3.76 billion in 2031, with a CAGR of 6.62% for the forecast period between 2024 and 2031F. The global head and neck cancer market encompasses a diverse range of treatments and therapies aimed at addressing the complex and challenging landscape of cancers that affect the head and neck regions. The market is experiencing significant growth and evolution as the understanding of the disease and its treatment options continue to advance.

Head and neck cancers, which include tumors in the oral cavity, pharynx, larynx, and other areas, represent a substantial global healthcare burden. Risk factors such as tobacco and alcohol consumption, human papillomavirus (HPV) infection, and environmental factors contribute to the development of these cancers. The global market for head and neck cancer is driven by factors such as increasing incidence rates, improved diagnostic methods, and the development of innovative therapeutic approaches. Recent advancements in immunotherapy and targeted therapies have brought hope to patients. These emerging treatment modalities, along with a growing focus on precision medicine and personalized treatment plans, are transforming the

market. Key market players invest in research and development to introduce novel therapies and expand their product portfolios. Moreover, the increasing awareness about the importance of early detection and prevention contributes to market growth. The global head and neck cancer market is dynamic and rapidly evolving, focusing on improving patient outcomes through advanced treatment options and early intervention strategies.

### Novel Therapies in Immunotherapy

As per an article published by Elsevier, it was reported that the introduction of immunotherapies has brought about a notable transformation in the treatment of head and neck cancer. These therapies are primarily focused on modulating the immunosuppressive pathways that mediate the interaction between tumor cells and T-lymphocytes. An article published in August 2022 by Frontiers highlighted the significant potential of immunotherapies to generate enduring antitumor effects, particularly in the context of treating head and neck squamous cell carcinomas. Various immunotherapy approaches, including the use of costimulatory agonists, immune checkpoint inhibitors, antigenic vaccines, adoptive T cell transfer (ACT), oncolytic virus therapy, and EGFR-targeted therapy, are now being employed for the management of head and neck squamous cell carcinomas (HNSCC). For Instance, Merck declared in November 2023 that the U.S. Food and Drug Administration (FDA) has given the green light to KEYTRUDA, Merck's anti-PD-1 therapy, along with gemcitabine and cisplatin, for addressing individuals dealing with locally advanced unresectable or metastatic biliary tract cancer (BTC).

### Substantial Investment in Research and Development

In recent years, there has been a noticeable surge in research and development activities related to global head and neck cancer. The increased focus can be attributed to several factors, such as the rising incidence of head and neck cancer cases worldwide has spurred the need for more comprehensive research into prevention, early detection, and treatment strategies. Also, advancements in medical technologies, including genomics and targeted therapies, have opened new avenues for personalized and more effective treatments.

For instance, In October 2023, Nanobiotix, a biotechnology company in the later stages of clinical development, announced the initiation of patient enrollment for NANORAY-312, a phase III clinical trial to examine the safety and effectiveness of NBTXR3. The drug candidate has demonstrated significant promise in effectively

treating head and neck cancer among elderly patients. In September 2022, Genexine Inc, a biotechnology company in the clinical stage focused on developing and marketing immunotherapies, announcing the initiation of patient dosing in a phase II clinical trial. The company employed a triple combination therapy involving GX-188E (a therapeutic DNA vaccine), GX-I7 (a long-acting interleukin 7), OpdivoR (nivolumab), and PD-1 immune checkpoint inhibitor, for addressing metastatic or recurrent head and neck squamous cell carcinoma.

### Partnership and Acquisitions Between Key Market Players

In the dynamic landscape of global head and neck cancer market, strategic partnerships among key industry players have emerged as pivotal instruments for innovation and progress. These collaborations, characterized by shared expertise and resources, aim to advance research, develop cutting-edge therapies, and improve patient outcomes. Through such alliances, companies combine their strengths in drug development, medical technology, and clinical research to accelerate the discovery and delivery of novel treatments. These partnerships often foster synergies, allowing the pooling of knowledge, technologies, and financial resources. They facilitate the streamlining of regulatory processes and establishing wider access to global markets. Ultimately, these strategic alliances drive the evolution of more effective therapies, early detection methods, and personalized treatment solutions in the fight against head and neck cancers. The collective efforts of these collaborations hold promising potential for shaping the future of cancer care. For Instance, In November 2022, Fulgent Genetics, Inc., a technology-driven genetic testing company situated in the United States, revealed its acquisition of Fulgent Pharma Holdings, Inc. The acquisition aimed to offer a unified solution in the region's fight against head and neck cancer.

### Strategic Initiatives by Key Players

Key players in the global head and neck cancer therapeutics market have been strategically focused on several initiatives to enhance treatment outcomes and address unmet medical needs. These initiatives primarily revolve around innovative research and development efforts, collaborative partnerships, and technological advancements. Companies are heavily investing in novel therapies, including immunotherapies and targeted therapies, to improve patient survival rates and reduce adverse effects. Additionally, these players are expanding their product portfolios through mergers, acquisitions, and licensing agreements to broaden their market presence and offer comprehensive solutions. They emphasize personalized medicine approaches, aiming to tailor treatments based on individual patient characteristics. For instance, in April

2023, Eisai initiated the 'Made of More' initiative to foster a community for individuals affected by head and neck cancer. Additionally, Eisai is presently conducting trials combining its approved cancer medication, Lenvima, with other oncology drugs for treating head and neck cancers.

### Impact of COVID-19

The head and neck cancer therapeutics market experienced significant disruption due to the COVID-19 pandemic. The health crisis particularly affected highly immunocompromised cancer patients, leading to strict lockdowns that hindered their access to essential treatments. Additionally, cancer screenings, preventive healthcare services, and elective surgeries were often delayed, except in cases where the benefits outweighed the risks and to prioritize hospital resources for COVID-19 care.

An article published by NCBI (National Center for Biotechnology Information) highlighted that elective surgeries, including head and neck cancer surgeries, were postponed in many countries. Approximately 60% of scheduled outpatient visits at the European Institute of Oncology (IEO) were delayed. The diversion of medical resources to attend COVID-19 patients resulted in a setback for head and neck cancer treatment, leading to increased tumor growth, recurrence, and high mortality rates. As a result, the COVID-19 pandemic significantly impacted the head and neck cancer diagnostics market.

### Key Players Landscape and Outlook

With ongoing research and development, innovative treatments targeting PD-1/PD-L1 pathways have redefined the market. Additionally, companies are emerging with novel therapies, fostering a competitive market. The outlook is promising, emphasizing precision medicine, combination therapies, and biomarker research. Key players are intensifying efforts in clinical trials and strategic collaborations, underscoring a robust drive towards personalized and more effective treatments, potentially transforming the head and neck cancer market.

In August 2022, Genexine Inc, a clinical-stage biotech firm specializing in immunotherapeutics, announced the initiation of patient dosage in a phase II clinical trial. Employing a triple combination therapy comprising GX-188E (a therapeutic DNA vaccine), GX-I7 (a prolonged-acting interleukin 7), and OpdivoR (nivolumab), a PD-1 immune checkpoint inhibitor, the company aimed to treat metastatic head and neck squamous cell carcinoma.

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