

India Cancer Therapeutics Market Assessment, By Applications [Lung Cancer, Blood Cancer, Colorectal Cancer, Prostate Cancer, Breast Cancer, Cervical Cancer, Glioblastoma, Head & Neck Cancer, Malignant Meningioma, Mesothelioma, Melanoma, Others], By Therapeutics [Chemotherapy, Targeted Therapy, Immunotherapy, Hormonal Therapy, Other], By Top Selling Drugs [Revlimid, Avastin, Herceptin, Rituxan, Opdivo, Gleevec, Velcade, Imbruvica, Ibrance, Zytiga, Alimta, Xtandi, Tarceva, Perjeta, Temodar, Others], By End-user [Hospitals, Specialty Clinics, Cancer & Radiation Therapy Centers], By Region, By Opportunities and Forecast, FY2017-FY2031F

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Abstracts

India cancer therapeutics market size was valued at USD 5.01 billion in FY2023, which is expected to reach USD 12.7 billion in FY2031, with a CAGR of 12.3% for the forecast period between FY2024 and FY2031. Factors such as the rising cancer incidence, advanced treatments, increased awareness, government initiatives to reduce drug prices, and the potential for research due to a growing number of cases, notably in tobacco and gynecological cancers, are driving the India cancer therapeutics market.

India has second largest population. The country is experiencing a growing incidence of cancer, which acts as a primary catalyst for the expansion of India cancer therapeutics market. The presence of numerous advanced cancer cases, along with a substantial

pool of clinical research data and well-trained researchers equipped with high-quality information, presents a distinctive opportunity for conducting research and clinical trials in various regions of the nation. The substantial disparity between treatment demand and supply creates challenges in terms of affordability and accessibility.

However, this significant gap allows hospital administrators and entrepreneurs to explore novel opportunities to cater to a larger population of cancer patients. A surge in specific types of cancer cases, such as those related to tobacco and gynecological issues, presents an attractive opportunity for pharmaceutical companies to invest in their research and development endeavors in India cancer therapeutics market.

Increasing public awareness has led individuals to view the disease not as a 'terminal illness' but as a 'treatable condition,' prompting more patients to seek treatment rather than neglect it. Additionally, the proliferation of technology and the availability of advanced treatments with improved outcomes contributes significantly to the India cancer therapeutics market. The government has undertaken several initiatives to lower drug prices, with ongoing negotiations with pharmaceutical companies aimed at making treatments more affordable and accessible to patients. Moreover, the establishment of comprehensive cancer centers that offer a wide range of facilities under one roof enhances the feasibility of treatment.

Projected Rise in Cancer Cases

High prevalence of cancer is the major cause of exponential growth in India cancer therapeutics market. By 2025, India's cancer cases will rise to 29.8 million from 26.7 million in 2021. Last year, the North (2,408 cases per 100,000) and the Northeast (2,177 cases per 100,000) reported the highest incidence, with a higher prevalence among men. According to the Indian Council for Medical Research's 'Burden of Cancers in India' report, seven types of cancer contribute to over 40% of the total disease burden: lung (10.6%), breast (10.5%), esophagus (5.8%), mouth (5.7%), stomach (5.2%), liver (4.6%), and cervix uteri (4.3%).

Mizoram, Delhi, and Meghalaya had the highest cancer-related disability-adjusted life years (DALYs), with the most vulnerable age group being those aged 65–69. Previously, tobacco and alcohol consumption were considered the primary causes of cancer. However, factors such as obesity, exposure to radiation from mobile phone towers, consumption of vegetables grown in polluted water (such as rivers near industrial areas), food adulteration, and the use of artificial coloring in food and

vegetables have been identified as contributors to the increased cancer risk.

Accessible Cancer Testing

The proliferation of cancer testing facilities, coupled with their increased accessibility, has generated a notable surge in the growth of India cancer therapeutics market. A multifaceted set of factors underpins this phenomenon. The enhancement and wider reach of cancer screening initiatives have played a pivotal role in the early identification of cancer cases, necessitating prompt treatment. Also, the evolution of diagnostic methods and technologies has simplified the precise identification of diverse cancer types and stages, thereby amplifying the requirement for customized and precise therapeutic interventions.

Furthermore, the heightened awareness among healthcare providers and the public regarding the significance of early diagnosis and treatment has catalyzed this heightened demand. Consequently, pharmaceutical companies and medical researchers increasingly channel their efforts into creating innovative and efficacious cancer therapeutics to address this mounting healthcare challenge.

As an example, in June 2023, AstraZeneca India entered a memorandum of understanding (MOU) with the Rajiv Gandhi Cancer Institute and Research Centre (RGCI&RC). The partnership aims to establish a Center of Excellence (CoE) within the RGCI&RC laboratory in Delhi. The primary objective of this collaboration is to improve the accessibility of subsidized, top-tier, and validated next-generation sequencing (NGS) molecular panel testing for eligible individuals diagnosed with lung cancer in India.

Government Initiatives

Government initiatives have played a major role in boosting the India cancer therapeutics market. The National Programme for Prevention and Control of Cancer, Diabetes, Cardiovascular Diseases, and Stroke (NPCDCS), which is a part of the National Health Mission, focuses on screening individuals aged 30 and above for three prevalent types of cancer: oral, breast, and cervical. To bolster the preventive measures against cancer, the Ayushman Bharat Health and Wellness Centre scheme enhances comprehensive primary healthcare by encouraging wellness activities and targeted communication within the community.

Furthermore, various media platforms, including print, electronic, and social media, are

leveraged to educate and engage the community in cancer awareness continually. A notable initiative occurred when the Centre for the Fourth Industrial Revolution, India, presented groundbreaking plans in a new white paper published by the World Economic Forum. This initiative, known as the FIRST Cancer Care (FCC) program, was introduced in November 2022. The FCC report represents a digital strategy addressing cancer management comprehensively, encompassing prevention and treatment. Its primary goal is to provide timely cancer care of superior quality that is more precise while ensuring equitable access across the nation.

Growing Need for Biliary Tract Cancer Treatments

BTC represents a category of uncommon and aggressive gastrointestinal (GI) malignancies that develop within the cells of the bile ducts (known as cholangiocarcinoma), the gallbladder, or the ampulla of Vater, which is the juncture, where the bile duct and pancreatic duct meet the small intestine. Except for ampullary cancer, early-stage BTC often manifests without distinct symptoms, leading to the diagnosis of most new cases at advanced stages. Unfortunately, advanced-stage BTC has limited treatment options and a bleak prognosis. India records over 30,000 new BTC cases annually, with approximately 90% diagnosed in the advanced stages indicating a greater opportunity for companies wanting to enter the India cancer therapeutics market. Gallbladder cancer exhibits a high incidence in northern India. For example, in February 2022, AstraZeneca India, a prominent research-driven biopharmaceutical firm, disclosed that it had received further approval from the Central Drugs Standard Control Organization (CDSCO) to use Durvalumab for the treatment of biliary tract cancer (BTC) in India.

Preference for Chemotherapy

Chemotherapy is a widely favored approach to cancer treatment in India due to its established effectiveness in targeting rapidly dividing cancer cells throughout the body. This systemic treatment employs potent drugs to inhibit cancer cell growth and eliminate them. Its broad applicability makes it a common choice for various cancer types and stages, offering hope for patients with limited alternatives. However, chemotherapy can have significant side effects, including hair loss, nausea, and weakened immunity, which may require supportive care.

Despite these challenges, chemotherapy remains the backbone of cancer treatment in India. Various companies' introduction of more economical medications contributes to the growth of the India cancer therapeutics market. For example, in June 2023,

Glenmark Pharmaceuticals, headquartered in Mumbai, announced a reduction in the price of the drug Trastuzumab, used in the treatment of HER2-positive breast cancer and marketed in India under the brand name 'Trumab.' The price of a 440 mg Trumab vial will be Rs 15,749, making it the most cost-effective option currently available in the country. Trastuzumab, a monoclonal antibody, has long been a cornerstone in treating HER2-positive breast cancer. The high cost of Trastuzumab therapy has posed a significant barrier for many patients in India.

Impact of COVID-19

The COVID-19 pandemic brought profound changes in the healthcare landscape in India, prompting concerns about its repercussions on non-COVID medical conditions, notably cancer. During the nationwide lockdown in India from March 25th to May 31st, 2020, approximately 70% of cancer patients were unable to access critical surgeries and treatments. Chemotherapy sessions and follow-ups were postponed, and private cancer clinics in major Indian cities witnessed a substantial 50% reduction in patient visits. Even as restrictions were gradually eased from June 2020, a backlog of cancer patients in need of urgent care persisted. The impact of COVID-19 was felt in the India cancer therapeutics market. Based on Ipsos' Oncology Sales Audit data for India, the estimated annual market revenue experienced a historic decline, projecting a figure of INR 39.6 billion for the entire year of 2020. It represents a 12% decrease compared to the estimated value for 2019 and a 21% decline from the initial pre-pandemic estimate for 2020.

Key Players Landscape and Outlook

Several pharmaceutical firms are strategically pursuing mergers and collaborations to establish a robust presence within the burgeoning India cancer therapeutics market. The approach enables companies to harness synergies, combining their research and development capabilities, distribution networks, and expertise in clinical trials. By doing so, they can navigate the complex regulatory landscape, adapting to unique market dynamics, and effectively addressing the diverse needs of cancer patients in India.

Moreover, such partnerships facilitate the introduction of novel and more affordable cancer treatments, ensuring that a wider spectrum of patients can access and benefit from advanced therapies, ultimately driving growth in this critical pharmaceutical industry sector.

As an example, in May 2023, Lupin Limited revealed a strategic partnership with Enzen

e Biosciences to introduce Cetuximab in the Indian market. This collaboration signifies a notable achievement in broadening treatment alternatives and nurturing innovation in the vital head and neck cancer therapy domain. Cetuximab is accessible in the form of a 100mg vial.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

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