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Lung Cancer Therapeutics Market Assessment, By Disease Type [Non-small Cell Lung Cancer, Small Cell Lung Cancer], By Treatment [Chemotherapy, Radiation Therapy, Immunotherapy Targeted Therapy, Others], By Drugs Class [Immunosuppressant, Monoclonal Antibodies, Tyrosine Kinase, Epidermal Growth Factors Receptors, Topoisomerase Inhibitors, Others], By Route of Administration [Oral, Injectable], By Distribution Channel [Hospital, Specialty Clinics, Clinical Research Institutes, Home Care Settings, Ambulatory Surgical Centers], By Region, Opportunities and Forecast, 2016-2030F

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Abstracts

Global lung cancer therapeutics market size was valued at USD 21.2 billion in 2022 and is expected to reach USD 56 billion in 2030, with a CAGR of 12.9% for the forecast period between 2023 and 2030F. Advancements in lung cancer therapeutics have risen due to heightened awareness of the disease in both developed and developing nations. The surge is attributed to the evolution of new medical diagnostic tools and state-of-the-art therapies and governments' amplified focus on healthcare infrastructure and improved treatment provisions. Another crucial catalyst propelling market growth is the increasing public awareness about diverse lung cancer treatment options.

Furthermore, factors such as growing disposable incomes, ongoing research and development for innovative technologies, the introduction of cutting-edge radiation

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therapy, the growing emphasis on personalized medicine, and the expanding economies in developing and underdeveloped regions are expected to bolster the market's growth trajectory throughout the projected period. Advancements in treatment options have significantly transformed the landscape of lung cancer therapeutics. The market has seen a surge in clinical trials and research exploring novel therapies, combination treatments, and early diagnosis methods, all aimed at improving patient outcomes and survival rates. As the global healthcare industry continues to prioritize oncology and personalized medicine, the lung cancer therapeutics market is expected to witness further advancements, driving improved survival rates, enhanced treatment efficacy, and better quality of life for patients diagnosed.

Rising prevalence of lung cancer

The global lung cancer therapeutics market has experienced a concerning upsurge in the prevalence of lung cancer cases. Lung cancer remains a significant health challenge, contributing to a substantial portion of cancer-related mortality worldwide. Factors such as widespread smoking, environmental pollutants, and lifestyle changes contribute to the escalating incidence of lung cancer. As projected by the American Cancer Society, in 2022, there were about 236,740 estimated new cancer cases and 130,180 estimated deaths in the United States.

Advancements in medical technology and increased awareness have led to earlier detection, improving survival rates. However, the rise in cases continues to propel the demand for more effective therapeutic interventions. Pharmaceutical companies, medical researchers, and healthcare providers are intensively focusing on developing innovative treatments, including targeted therapies, immunotherapies, and personalized medicine, to address this growing concern.

Advancement in Therapies

The global lung cancer therapeutics market has witnessed significant advancements in recent years, marked by innovative approaches and therapies. Immunotherapy, particularly immune checkpoint inhibitors such as Pembrolizumab and Nivolumab, have revolutionized lung cancer treatment by improving the body's immune response against cancer cells. Targeted therapies like EGFR inhibitors (such as Erlotinib and Osimertinib) and ALK inhibitors (such as Alectinib and Crizotinib) have shown remarkable efficacy in specific genetic mutations, leading to more personalized and effective treatment options. Moreover, advancements in precision medicine and the utilization of liquid biopsies for early detection of genetic mutations have improved diagnosis and treatment

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decision-making. Emerging technologies like CAR-T cell therapy and novel drug delivery systems offer promising avenues for the future. These developments reflect a paradigm shift towards more tailored, effective, and less invasive therapies, enhancing the prognosis and quality of life for lung cancer patients.

In July 2023, Iovance Biotherapeutics completed an initial evaluation of the Phase II trial for its autologous tumor-infiltrating lymphocyte (TIL) therapy, Lifileucel (LN-145), in patients diagnosed with metastatic non-small cell lung cancer (NSCLC). A review by the US FDA suggested that the trial design might be appropriate for accelerated approval. The encouraging feedback from regulators is grounded in the utilization of Lifileucel among patients with advanced, non-genomic mutant NSCLC who have undergone at least one FDA-approved targeted treatment.

Strategic Initiatives by Key Players

Key players in the global lung cancer therapeutics market have been actively involved in strategic initiatives to advance treatment options and improve patient outcomes. Many companies have focused on research and development, investing heavily in innovative therapies and technologies. Initiatives include the development of targeted therapies, immunotherapies, and precision medicine approaches tailored to specific genetic mutations and biomarkers.

Key pharmaceutical companies have introduced novel therapies targeting specific mutations and mechanisms involved in lung cancer progression. For example, the development and release of immunotherapies such as PD-1/PD-L1 inhibitors have marked a substantial breakthrough, offering improved treatment efficacy and reduced side effects compared to traditional chemotherapy. For instance, during June 2022, the European Commission granted approval to Novartis for Tabrecta in treating advanced non-small cell lung cancer with METex14 skipping.

Increasing Progress in Research and Development

The global lung cancer therapeutic market is experiencing significant growth, largely driven by the rising demand for precision medicine, a foundation of which is targeted therapies. The increase in demand can be attributed to the increasing research and development efforts in the field. For instance, in July 2023, the publication of a ten-year clinical trial revealed that lung cancer patients with the epidermal growth factor receptor (EGFR) mutation experienced notably increased survival rates when administered the drug Osimertinib. This development marks a significant stride in the realm of precision

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medicine and opens new opportunities for clinical laboratories to provide added value to both physicians and patients. The ADAURA project, led by scientists at Yale University and supported by AstraZeneca, a British pharmaceutical and biotechnology company, spearheaded this research. When pathology tests identify the EGFR mutation in a patient, there's substantial evidence indicating that the use of this targeted therapy could potentially decrease lung cancer-related fatalities by up to 50%.

Impact of COVID-19

Patients diagnosed with lung cancer faced an increased vulnerability to Covid-19 infection due to their common intake of immunosuppressive and chemotherapeutic medications during treatment. Managing these patients amid the pandemic posed a persistent challenge. To address this difficulty, multiple organizations collaborated to propose solutions and guidelines. For instance, as documented, in a January 2022 article in the Journal for Immunotherapy of Cancer, the European Society for Radiotherapy and Oncology and the American Society for Radiation Oncology joined forces to recommend treatments for various stages of lung cancer, including non-small cell lung cancer (NSCLC) in stages I–III, prophylactic cranial irradiation for small cell lung cancer (SCLC), and palliative radiation for NSCLC.

Furthermore, these recommendations catered to both an 'early pandemic scenario', where balancing patient and radiotherapy staff safety with lung cancer treatment was crucial, and a 'later pandemic scenario', which involved limited resources and necessitated patient prioritization. Consequently, the collective efforts of these organizations to confront treatment challenges amplified the demand for lung cancer therapeutics. Moreover, due to lockdown measures, better access to treatments is now available compared to the initial phase of the pandemic, resulting in the market reaching pre-pandemic growth levels and anticipated substantial growth in the forecast period.

Key Players Landscape and Outlook

Key industry leaders are heavily investing in research and development to expand their product portfolios, fostering further growth within the lung cancer therapeutics sector. These players are pursuing diverse strategic actions to broaden their global presence, such as introducing new products, entering contracts, engaging in mergers and acquisitions, amplifying investments, advancing market strategies, and establishing collaborations with other organizations. Competitors in the market must provide cost-effective solutions to expand and endure in a progressively competitive and burgeoning market landscape.

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In April 2022, the United States FDA accepted the supplemental Biologics License Application for Enhertu (trastuzumab deruxtecan) for treating unresectable or metastatic non-small cell lung cancer (NSCLC) in adult patients, developed by AstraZeneca and Daiichi Sankyo.

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