

# **Non-Small Cell Lung Cancer Market Assessment, By Type [Squamous Cell Carcinoma, Large Cell Carcinoma, Adenocarcinoma, Others], By Treatment Type [Chemotherapy, Targeted Therapy, Immunotherapy], By Drug Class [Angiogenesis Inhibitor, Epidermal Growth Factor Receptor Blocker, Kinase Inhibitor, Microtubule Stabilizer, Folate Antimetabolites, PD-1/PD-L1 Inhibitor], By Distribution Channel [Hospital Pharmacy, Drug Store & Retail Pharmacy, Online Pharmacy], By Region, Opportunities and Forecast, 2016-2030F**

<https://marketpublishers.com/r/N1474BB18730EN.html>

Date: March 2025

Pages: 221

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

ID: N1474BB18730EN

## **Abstracts**

Global non-small cell lung cancer market size was valued at USD 10.6 billion in 2022, and is expected to reach USD 21.9 billion in 2030, with a CAGR of 9.5% for the forecast period between 2023 and 2030F. The global non-small cell lung cancer market is a dynamic landscape characterized by ongoing advancements in treatment modalities, diagnosis, and a growing understanding of the disease.

NSCLC represents a predominant form of lung cancer, constituting approximately 85% of all lung cancer cases. For instance, according to the 2023 statistics published by ACS, about 238,340 new cases of lung cancer are expected to be diagnosed in 2023. This market is shaped by a complex interplay of factors, including technological innovations, evolving therapeutic strategies, and increasing awareness of personalized medicine. Advancements in precision medicine have revolutionized NSCLC treatment, with a shift towards targeted therapies and immunotherapies tailored to specific genetic

mutations or biomarkers present in individual patients.

The emergence of immune checkpoint inhibitors and targeted therapies, such as EGFR and ALK inhibitors, has significantly transformed the treatment paradigm, offering improved outcomes and reduced side effects compared to traditional chemotherapy. Moreover, the landscape is continually evolving with ongoing research and development initiatives, aiming to discover novel therapeutic targets, innovative combination therapies, and diagnostic tools for early detection. Biomarker-driven therapies, liquid biopsies, and companion diagnostics play a pivotal role in treatment selection, enabling more precise and effective interventions for patients. Market competition is intense, with pharmaceutical companies investing significantly in research and clinical trials to introduce novel therapies and expand their product portfolios. However, challenges persist, including high treatment costs, access disparities, and the need for more comprehensive screening programs to diagnose NSCLC at earlier stages.

### Strategic Partnership Between Key Players

In the dynamic landscape of the global non-small cell lung cancer market, strategic collaborations have emerged as pivotal. Major players, such as pharmaceutical firms and biotech companies, are forging impactful partnerships. Recent alliances between leading diagnostic technology providers and pharmaceutical giants aim to revolutionize treatment through precision medicine and innovative therapies. These collaborations focus on joint research, development, and commercialization, leveraging collective expertise to introduce novel treatments and diagnostic solutions.

This strategic convergence fosters a synergetic approach, propelling advancements in personalized medicine, improving patient outcomes, and reshaping the paradigm of non-small cell lung cancer management globally. For instance, Bristol Myers Squibb, finalized the acquisition of Turning Point Therapeutics on March 6, 2022. Turning Point Therapeutics is a clinical-stage precision oncology company with a lineup of internally developed investigative medications aimed at overcoming major constraints of current cancer treatments. This acquisition expanded Bristol Myers Squibb's oncology portfolio by incorporating late-stage precision oncology asset.

### Technological Advancements

The global non-small cell lung cancer market has seen significant technological advancements, revolutionizing treatment approaches. Targeted therapies, such as immunotherapies and precision medicine, have reshaped the landscape.

Immunotherapies like checkpoint inhibitors (PD-1/PD-L1 inhibitors) have shown remarkable efficacy in managing advanced NSCLC by enhancing the body's immune response against cancer cells. Additionally, the emergence of personalized medicine, utilizing genetic testing to identify specific mutations or biomarkers, has led to the development of drugs tailored to individual patients.

Liquid biopsies, a minimally invasive diagnostic technique, is gaining prominence for monitoring treatment response and detecting mutations. Furthermore, advancements in imaging technologies like PET scans and MRI have improved early detection and monitoring of NSCLC. In January 2023, Novocure announced the LUNAR study, which assessed the safety and effectiveness of Tumor Treating Fields (TTFields) in combination with standard treatments for stage 4 non-small cell lung cancer (NSCLC) after progression following or during platinum-based therapy, successfully achieved its main objective.

### New Innovations

The non-small cell lung cancer market has witnessed groundbreaking innovations aimed at revolutionizing treatment. Immunotherapies like checkpoint inhibitors, such as Pembrolizumab and Nivolumab, have reshaped the landscape by targeting specific proteins to enhance the immune response against cancer cells. Furthermore, targeted therapies like Osimertinib have shown efficacy in specific genetic mutations like EGFR, improving outcomes for patients. Liquid biopsy techniques are emerging, offering less invasive methods to detect genetic mutations, aiding in treatment decisions.

Advancements in precision medicine and biomarker testing are fostering personalized treatment approaches, optimizing therapies for individual patients. Additionally, advancements in combination therapies and innovative drug delivery systems are showing promising results in enhancing treatment efficacy and reducing side effects. During December 2022, the FDA in the United States, provided accelerated approval to Mirati's Krazati (adagrasib), offering a targeted treatment for adult patients diagnosed with KRAS-mutated locally advanced or metastatic non-small cell lung cancer.

### Increasing Investment by Companies in Developing Effective Therapies

The global non-small cell lung cancer market is witnessing a significant uptick in investment by companies aimed at developing more effective therapies. This surge in investment underscores a commitment to advancing the field of oncology and addressing the unmet medical needs of patients. Companies are allocating resources to

research and develop innovative treatments that encompass targeted therapies, immunotherapies, and precision medicine approaches. The increased focus is driven by a growing understanding of the molecular complexities of non-small cell lung cancer, leading to the identification of new drug targets and treatment strategies.

For example, during January 2023, DeuterOncology, a clinical-stage pharmaceutical firm, concluded a Series A financing round, securing approx. USD 6.1 million (EUR 5.65 million). This investment empowers the company to commence the phase I clinical investigation for its primary product DO-2, an enhanced MET kinase inhibitor designed as a promising targeted therapy for lung cancer, striving to be a top-tier treatment option. Recently, MET inhibitors have gained approval for treating patients with Non-Small Cell Lung Cancer (NSCLC) exhibiting the MET exon 14 skipping mutation.

### Impact of COVID-19

The growth of the non-small cell lung cancer market has been significantly impacted by COVID-19. Specifically, the pandemic led to the cessation of over 200 interventional studies, as indicated by clinicaltrials.gov until July 2021, resulting in a deceleration of market expansion. Nevertheless, with the easing of restrictions and the resumption of services, there has been a renewed emphasis on conducting clinical trials for non-small cell lung cancer treatment. Notably, in October 2022, Daiichi Sankyo, Inc., in collaboration with AstraZeneca, initiated a Phase II clinical trial to assess the safety and effectiveness of trastuzumab deruxtecan in treating HER2-mutated metastatic non-small cell lung cancer (NSCLC). These endeavors are anticipated to propel market growth throughout the projected period.

### Key Players Landscape and Outlook

The non-small cell lung cancer market is characterized by fragmentation and competitiveness, featuring numerous major players. These companies are implementing diverse strategic approaches like collaborations, partnerships, new product introductions, and other initiatives to maintain their standing in the market. The market features a competitive landscape with several key players driving innovation and therapeutic advancements. Immunotherapies and targeted therapies remain a focus, with ongoing clinical trials and the development of combination therapies. The market outlook is promising, with an increasing emphasis on early detection methods, liquid biopsy technologies, and the exploration of innovative drug delivery systems. Collaboration between key players, academic institutions, and biotech firms continues to drive the evolution of treatment options, underscoring a future of diversified, more

effective, and personalized therapies for NSCLC patients.

In June 2022, the European Commission granted approval to Novartis's Tabrecta (capmatinib) as a standalone treatment for adults dealing with advanced non-small cell lung cancer, necessitating systemic therapy after prior treatment with immunotherapy and/or platinum-based chemotherapy.

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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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