

# Targeted Protein Degradation Market by Type [PROTACs (Vepdegestrant, Bavdegalutamide), SERDs (Elacestrant), Molecular Glues (Mezigdomide), LDD, LYTAC/ATAC], Indication (Oncology, Inflammatory), Formulation (Oral), End User - Global Forecast to 2035

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## Abstracts

The global targeted protein degradation market is projected to reach USD 9.85 billion by 2035 from an estimated USD 0.48 billion in 2025, at a CAGR of 35.4% from 2025 to 2035. The expansion of the targeted protein degradation market has been predominantly fueled by Capital inflows & big-pharma tie-ups, and multi-indication expansion. However, CMC & scale-up complexity for heterobifunctional and IP disputes are expected to restrain market growth.

The oncology segment reported the highest CAGR in the therapeutic indications segment in 2024.

Based on therapeutic indications, the market is categorized into oncology, inflammatory diseases, and other therapeutic indications. Oncology is projected to exhibit the highest CAGR in the targeted protein degradation Market among all therapeutic indication segments. This rapid growth is driven by the increasing global burden of cancer and the urgent need for therapies that can target disease-causing proteins once considered undruggable. TPD technologies, including PROTACs and molecular glue degraders, offer a revolutionary approach by degrading, rather than inhibiting key oncogenic proteins, leading to more complete and durable therapeutic responses. Several biotech and pharmaceutical companies are advancing TPD candidates specifically for oncology indications, including prostate, breast, lung, hematologic, and solid tumors. Industry leaders, such as Arvinas, Kymera Therapeutics, Nurix Therapeutics, and C4 Therapeutics, are developing clinical-stage degraders targeting critical cancer-related

proteins like AR, ER, STAT3, and BTK. Additionally, big pharma partnerships and increasing regulatory support are accelerating development timelines.

With a growing focus on precision medicine, rising cancer incidence, and limitations of existing therapies, the oncology segment is poised to dominate the targeted protein degradation market. Continued innovation in TPD design, biomarker integration, and combination therapies will further drive growth and solidify oncology's role as the most dynamic and promising application area in this market.

The homecare settings segment registered the highest CAGR in the targeted protein degradation market by end user.

The targeted protein degradation market is segmented by end users into hospitals & specialty clinics, long-term care facilities, and home care settings. In 2024, the home care settings segment emerged as the fastest-growing end-user segment in the targeted protein degraders (TPD) market, driven by the growing demand for patient-centric, convenient, and cost-effective treatment options. One of the key factors contributing to this trend is the increasing development of oral TPD formulations, which allow patients to manage complex conditions like cancer and autoimmune diseases from the comfort of their homes. Unlike traditional biologics requiring hospital administration, oral degraders enable safe, effective treatment without the need for frequent clinic visits, significantly improving patient compliance and quality of life. The shift toward home-based care is further supported by the integration of digital health technologies, including remote patient monitoring and telehealth platforms, which allow physicians to track treatment response and manage side effects in real time. Healthcare systems are actively encouraging homecare models to reduce hospital burden and control treatment costs. As more targeted protein degraders progress through late-stage clinical development and gain regulatory approval, the dominance of home care settings is expected to strengthen. With their convenience, scalability, and alignment with modern healthcare delivery models, home care environments represent a vital and expanding channel for TPD therapies in the evolving treatment landscape.

North America accounted for the largest share in the global targeted protein degradation market from 2025 to 2030.

North America accounted for the largest share in the targeted protein degradation market, driven by a strong foundation in biotechnology innovation, a favorable regulatory landscape, and significant investment activity. The region is home to several pioneering TPD companies, including Arvinas, Kymera Therapeutics, Nurix

Therapeutics, and C4 Therapeutics, which are advancing cutting-edge degrader technologies into clinical development. In addition, major pharmaceutical firms such as Bristol Myers Squibb and Pfizer are actively expanding their TPD pipelines through collaborations and internal R&D. The region benefits from a mature healthcare infrastructure, access to top-tier academic research institutions, and early adoption of novel therapeutic modalities. The US Food and Drug Administration (FDA) has shown increasing recognition of TPD-based therapies, granting designations that facilitate faster development and approval. Furthermore, the growing emphasis on oral and home-based treatments aligns well with healthcare delivery models in North America.

These factors collectively position North America as a key driver of innovation, commercialization, and clinical advancement in the global TPD market, making it the fastest-growing regional segment.

The primary interviews conducted for this report can be categorized as follows:

By Respondent: Supply Side- 70% and Demand Side- 30%

By Designation: Managers- 45%, CXO and Directors- 30%, and Executives- 25%

By Region: North America- 30%, Europe- 30%, Asia Pacific- 30%, Latin America- 5%, and the Middle East & Africa- 5%

## Key Companies

Key players in the targeted protein degradation market include Bristol Myers Squibb (US), Arvinas (US), BeiGene (US), Nurix (US), Kymera (US), C4 Therapeutics (US), Stemline Therapeutics (US), AstraZeneca (UK), F. Hoffmann-La Roche Ltd (Switzerland), Bayer (Vividion) (Germany), Captor Therapeutics (Poland), Ranok Therapeutics (US), Pfizer (US), Novartis (Switzerland), and Foghorn Therapeutics (US).

## Research Coverage

This research report categorizes the targeted protein degradation market, by type [molecular glue (mezigdomide, Iberdomide), SERDs (Elacestrant, Giredestrant, Camizestrant), PROTAC (Vepdegestrant, Bavdegalutamide, BGB-16673, NX-5948, KT-474), LDD/BiDAC, LYTAC/ATAC, Autophagy-targeting chimeras] therapeutic

indication (oncology, inflammatory diseases, and others), Formulation (oral formulations and injections), end user (hospitals & speciality clinics, long-term care facility and home care settings) and region (North America, Europe, Asia Pacific, Latin America, and Middle East & Africa).

The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the targeted protein degradation market. A detailed analysis of the key industry players has been done to provide insights into their business overview, products, solutions, key strategies, collaborations, partnerships, and agreements. New approvals/launches, collaborations, acquisitions, and recent developments associated with the targeted protein degradation market.

### **Reasons to buy this report**

The report will help market leaders and new entrants by providing them with the closest approximations of the revenue numbers for the overall targeted protein degradation market and its subsegments. It will also help stakeholders better understand the competitive landscape and gain more insights to better position their businesses and make suitable go-to-market strategies. This report will enable stakeholders to understand the market's pulse and provide them with information on the key market drivers, restraints, opportunities, and challenges.

### **The report provides insights on the following pointers:**

Analysis of key drivers (Increasing first-in-class approvals with priority/FT designations, expanding multi-indication use, increasing capital inflows and big-pharma collaborations, and technological advancements in degrader design and discovery) restraints (CMC and scale-up complexity for heterobifunctionals, off-target toxicity and cytokine storms in first-gen PROTACs, and IP disputes), opportunities (Growing adoption of CNS and immunology degraders in clinics, development of next-gen ligases with tissue-selective expression, and increasing NDA filing for innovative degraders), and challenges (Limited ligase expression and strict regulatory guidelines) influencing the growth of the market.

**Service Development/Innovation:** Detailed insights on upcoming technologies, research & development activities in the targeted protein degradation market

**Market Development:** Comprehensive information about lucrative markets

across varied regions

**Market Diversification:** Exhaustive information about untapped geographies, recent developments, and investments in the targeted protein degradation market

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, and product offerings of leading players. A detailed analysis of the key industry players has been done to provide insights into their key strategies, product launches/ approvals, acquisitions, partnerships, agreements, collaborations, other recent developments, investment and funding activities, brand/product comparative analysis, and vendor valuation and financial metrics of the targeted protein degradation market.

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