

Global Immuno-Oncology Market Demand Analysis & Opportunity Evaluation, 2019-2027

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Abstracts

The global immuno-oncology treatment market reached USD 53,859.48 million in 2018 and is expected to reach USD 157,230.48 million by 2027, by registering a CAGR of 12.68%, across the globe. This is primarily attributed to the rising concerns over hospital acquired infections across the globe.

North America captured a share of 48.13% in the year 2018 and is expected to dominate the market, over the forecast period. The growth in the region can be attributed to increase in investments towards healthcare from government and private entities to maintain the highest quality of care offered in healthcare facilities. The US is the major country driving the growth in the region, reaching a market value of USD 24,040.00 million in 2018 and is expected to grow at a CAGR of 13.14% over the forecast period i.e. 2020-2027. On the back of rising adoption of innovative treatment modalities focused on personalized medicine, it is expected to result in the market growth over the forecast period.

Availability of advanced diagnostic products that are capable of effectively diagnosing rare cancers are resulting in increasing number of people availing early treatment. The Asia Pacific region captured a market size of USD 10,560.34 million in the year 2018 and is expected to reach USD 32,498.22 million by 2027, with a CAGR of 13.32%. The market is primarily led by the demand from China, with a market of USD 4,199.90 million in the year 2018, and it is expected to grow at a CAGR of 14.54%. With the rising availability of advanced pharmaceuticals in this region, with rising number of products being approved in countries such as China, Japan, & India, to address the growing number of cancer patients in this region, the demand for immuno-oncology treatment products in this region is expected to witness a rapid growth over the forecast period.

Europe is expected to reach a market size of USD 36,620.08 million by 2027. It has been observed that with the availability of innovative treatment modalities, there has been a shift in treatment preferences from conventionally prescribed chemotherapy products to advanced and highly targeted treatment products. Although these products are relatively higher priced, there is an increasing number of patients opting for these products as along with a superior mode of action providing a faster recovery, they also enable a better quality of life during the treatment course with reduced side effects. Over the recent years, it has been observed that the European Union has been increasingly approving large number of immuno-oncology products such as cellular immunotherapy and immune checkpoint inhibitors. Although the presence of biosimilars in this region have affected the revenue recognition of certain products (Rituximab), this region is expected to generate a steady demand for advanced pharmaceutical products.

On the basis of segmentation by administration, the market is divided into standalone and combination therapies from which combination therapies is presently capturing a vast majority of the market. A large number of approved products are being investigated with various combinations of other immunotherapy products or else chemotherapy drugs. This is recommended in cases when the cancer has either spread to other regions of the body or else the healthcare provided opts for a highly aggressive treatment method. However, increasing number of drugs are being studied and approved as standalone therapies especially targeting benign tumors.

On the basis of end user, the market is segmented into hospitals, ambulatory surgical centers, clinics, and others. The hospitals segment captured the largest market with USD 38,075.29 million in 2018 and is expected to reach USD 109,482.05 million by 2027 with a CAGR of 12.50% over the forecast period. This can be attributed to the high number of patients encountered by hospitals and large facilities in comparison to smaller facilities such as clinics. Some of the largest players in this market are Roche, Merck, Amgen, Janssen, Eli Lilly and Novartis

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Strategic Recommendations

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