

# **Head and Neck Cancer Therapeutics Market- Global Industry Size, Share, Trends, Opportunity and Forecast, Segmented By Type (Diagnostic Methods, Treatment Type), By Diagnostic Methods (Biopsy, Imaging, Endoscopy, Others), By Treatment Type (Surgery, Radiation Therapy, Chemotherapy, Immunotherapy, Targeted Therapy), By Disease Indication (Lip and Oral Cavity Cancer, Laryngeal Cancer, Oropharyngeal Cancer, Salivary Gland Cancer, Nasopharyngeal Cancer, Hypopharyngeal Cancer), By Route of Administration (Injectable, Oral), By Therapeutic Class (PD Inhibitors, EGFR Inhibitors, Microtubule Inhibitors), By End User (Hospitals, Specialty Clinics, Ambulatory Surgical Centers, Others), By Region & Competition, 2021-2031F**

<https://marketpublishers.com/r/H6391FEBFB7CEN.html>

Date: January 2026

Pages: 182

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

ID: H6391FEBFB7CEN

## **Abstracts**

The Global Head and Neck Cancer Therapeutics Market is projected to expand significantly, rising from USD 2.38 Billion in 2025 to USD 4.91 Billion by 2031, reflecting a compound annual growth rate of 12.83%. This sector comprises various pharmaceutical interventions, including chemotherapies, immunotherapies, and targeted agents, specifically developed to address malignancies affecting the oral cavity, pharynx, and larynx. The principal force propelling this market forward is the escalating incidence of these cancers, primarily driven by risk factors such as tobacco

usage and alcohol consumption. According to the 'American Cancer Society', in '2024', an estimated 58,450 new cases of oral cavity and pharynx cancer were diagnosed in the United States, highlighting the increasing disease burden that necessitates the demand for effective treatment solutions.

However, the market encounters a substantial obstacle regarding the prohibitive expense of newly approved biologics and immunotherapies. This financial strain limits patient access and slows adoption rates, especially in developing countries where healthcare reimbursement structures are restricted, thereby hindering the overall potential for market growth.

### **Market Driver**

The swift integration of immune checkpoint inhibitors and PD-1/PD-L1 antagonists has radically transformed the treatment landscape for head and neck squamous cell carcinoma (HNSCC). These biologic agents have advanced from being second-line alternatives to becoming standard-of-care therapies, effectively supplanting or complementing traditional platinum-based chemotherapies because of their enhanced efficacy in metastatic scenarios. This therapeutic evolution is quantitatively demonstrated by the financial success of industry leaders; according to Merck & Co., Inc., February 2024, in the '2023 Annual Report', sales of the PD-1 therapy Keytruda increased by 19% to \$25.0 billion, a rise linked partially to continued global demand for treating head and neck cancer. The broad adoption of immunotherapies boosts market value by establishing premium pricing and prolonging patient survival, which subsequently requires extended treatment durations relative to conventional protocols.

At the same time, the market is being redefined by the increasing prevalence of HPV-associated oropharyngeal cancers, resulting in a distinct and growing patient demographic. This epidemiological shift is driven by deficiencies in preventative care that leave significant portions of the population vulnerable to these malignancies. According to the American Society of Clinical Oncology (ASCO), June 2024, research presented at the '2024 Annual Meeting' emphasized that fewer than 60% of adolescents had received the HPV vaccine in 2022, suggesting a lingering pool of high-risk individuals prone to future infection-related cancers. Acknowledging the necessity for new modalities to manage this changing disease burden, investors are directing substantial funds into the industry. For example, according to Bicycle Therapeutics, May 2024, in the press release 'Bicycle Therapeutics Announces \$555 Million Private Placement Equity Financing', the firm obtained \$555 million to further its clinical pipeline of precision-guided therapeutics for oncology conditions, including head and neck

cancer.

## Market Challenge

The prohibitive costs associated with newly approved biologics and immunotherapies present a substantial barrier to the growth of the Global Head and Neck Cancer Therapeutics Market. While these advanced pharmaceutical interventions offer improved clinical outcomes, their high price points create severe financial toxicity that restricts patient access and limits market penetration. In many regions, particularly those with constrained healthcare budgets or underdeveloped reimbursement frameworks, the economic burden forces healthcare providers to prioritize conventional, lower-cost treatments over novel agents. This affordability gap directly reduces the addressable patient population for premium therapeutics, thereby stalling adoption rates and curbing revenue expansion for manufacturers.

The magnitude of this financial challenge is evidenced by the elevated expenses incurred during care. According to the 'American Academy of Otolaryngology?Head and Neck Surgery', in '2024', the median treatment cost for patients with head and neck cancer was found to be \$79,151, a figure significantly higher than that for many other malignancies. This exorbitant cost structure discourages the widespread prescription of cutting-edge therapies, as high out-of-pocket expenditures and insufficient insurance coverage render them inaccessible for a large demographic. Consequently, the market fails to realize its full potential, as the economic feasibility of these sophisticated treatments remains a critical impediment to broader utilization.

## Market Trends

The emergence of novel combination therapies is significantly influencing the market, particularly through the pairing of bispecific antibodies with established immune checkpoint inhibitors to enhance clinical efficacy. This therapeutic strategy aims to overcome resistance mechanisms inherent in monotherapies by simultaneously targeting multiple oncogenic pathways, such as EGFR and LGR5, thereby improving outcomes in recurrent or metastatic settings. According to Merus N.V., May 2024, in the press release 'Merus Announces Abstract on Petosemtamab in Combination with Pembrolizumab in 1L HNSCC Selected for Oral Presentation at 2024 ASCO Annual Meeting', the investigational combination demonstrated a 67% objective response rate in evaluable patients, highlighting the superior performance of these multi-modal regimens compared to traditional single-agent protocols.

Simultaneously, the market is characterized by the exploration of arenaviral-based therapeutic vaccines designed to elicit robust T-cell responses against HPV-positive malignancies. This trend represents a shift toward active immunotherapy, where novel vector platforms are employed to deliver tumor-specific antigens directly to the immune system, potentiating the effects of standard PD-1 blockade. According to HOOKIPA Pharma Inc., June 2024, in the press release 'HOOKIPA Pharma Announces Updated Phase 2 Clinical Data at the American Society of Clinical Oncology 2024 Annual Meeting', the combination of their immunotherapy HB-200 with pembrolizumab yielded a confirmed objective response rate of 53% in patients with a PD-L1 combined positive score of 20 or higher. This development illustrates the industry's commitment to precision-guided interventions for virally driven cancers.

### **Key Market Players**

Eli Lilly and Company

Merck & Co., Inc.

F. Hoffmann-La Roche Ltd.

Bristol-Myers Squibb Company

AstraZeneca plc

Pfizer Inc.

Sanofi S.A.

Novartis AG

Amgen Inc.

Boehringer Ingelheim International GmbH

### **Report Scope**

In this report, the Global Head and Neck Cancer Therapeutics Market has been segmented into the following categories, in addition to the industry trends which have

also been detailed below:

### Head and Neck Cancer Therapeutics Market, By Type

Diagnostic Methods

Treatment Type

### Head and Neck Cancer Therapeutics Market, By Diagnostic Methods

Biopsy

Imaging

Endoscopy

Others

### Head and Neck Cancer Therapeutics Market, By Treatment Type

Surgery

Radiation Therapy

Chemotherapy

Immunotherapy

Targeted Therapy

### Head and Neck Cancer Therapeutics Market, By Disease Indication

Lip and Oral Cavity Cancer

Laryngeal Cancer

Oropharyngeal Cancer

Salivary Gland Cancer

Nasopharyngeal Cancer

Hypopharyngeal Cancer

Head and Neck Cancer Therapeutics Market, By Route of Administration

Injectable

Oral

Head and Neck Cancer Therapeutics Market, By Therapeutic Class

PD Inhibitors

EGFR Inhibitors

Microtubule Inhibitors

Head and Neck Cancer Therapeutics Market, By End User

Hospitals

Specialty Clinics

Ambulatory Surgical Centers

Others

Head and Neck Cancer Therapeutics Market, By Region

North America

United States

Canada

Mexico

## Europe

France

United Kingdom

Italy

Germany

Spain

## Asia Pacific

China

India

Japan

Australia

South Korea

## South America

Brazil

Argentina

Colombia

## Middle East & Africa

South Africa

Saudi Arabia

UAE

## **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Head and Neck Cancer Therapeutics Market.

## **Available Customizations:**

Global Head and Neck Cancer Therapeutics Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## **Company Information**

Detailed analysis and profiling of additional market players (up to five).

## Contents

### **1. PRODUCT OVERVIEW**

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### **2. RESEARCH METHODOLOGY**

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

### **3. EXECUTIVE SUMMARY**

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

### **4. VOICE OF CUSTOMER**

### **5. GLOBAL HEAD AND NECK CANCER THERAPEUTICS MARKET OUTLOOK**

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Type (Diagnostic Methods, Treatment Type)
  - 5.2.2. By Diagnostic Methods (Biopsy, Imaging, Endoscopy, Others)
  - 5.2.3. By Treatment Type (Surgery, Radiation Therapy, Chemotherapy, Immunotherapy, Targeted Therapy)

- 5.2.4. By Disease Indication (Lip and Oral Cavity Cancer, Laryngeal Cancer, Oropharyngeal Cancer, Salivary Gland Cancer, Nasopharyngeal Cancer, Hypopharyngeal Cancer)
  - 5.2.5. By Route of Administration (Injectable, Oral)
  - 5.2.6. By Therapeutic Class (PD Inhibitors, EGFR Inhibitors, Microtubule Inhibitors)
  - 5.2.7. By End User (Hospitals, Specialty Clinics, Ambulatory Surgical Centers, Others)
  - 5.2.8. By Region
  - 5.2.9. By Company (2025)
- 5.3. Market Map

## **6. NORTH AMERICA HEAD AND NECK CANCER THERAPEUTICS MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Value
- 6.2. Market Share & Forecast
  - 6.2.1. By Type
  - 6.2.2. By Diagnostic Methods
  - 6.2.3. By Treatment Type
  - 6.2.4. By Disease Indication
  - 6.2.5. By Route of Administration
  - 6.2.6. By Therapeutic Class
  - 6.2.7. By End User
  - 6.2.8. By Country
- 6.3. North America: Country Analysis
  - 6.3.1. United States Head and Neck Cancer Therapeutics Market Outlook
    - 6.3.1.1. Market Size & Forecast
      - 6.3.1.1.1. By Value
    - 6.3.1.2. Market Share & Forecast
      - 6.3.1.2.1. By Type
      - 6.3.1.2.2. By Diagnostic Methods
      - 6.3.1.2.3. By Treatment Type
      - 6.3.1.2.4. By Disease Indication
      - 6.3.1.2.5. By Route of Administration
      - 6.3.1.2.6. By Therapeutic Class
      - 6.3.1.2.7. By End User
  - 6.3.2. Canada Head and Neck Cancer Therapeutics Market Outlook
    - 6.3.2.1. Market Size & Forecast
      - 6.3.2.1.1. By Value

#### 6.3.2.2. Market Share & Forecast

##### 6.3.2.2.1. By Type

##### 6.3.2.2.2. By Diagnostic Methods

##### 6.3.2.2.3. By Treatment Type

##### 6.3.2.2.4. By Disease Indication

##### 6.3.2.2.5. By Route of Administration

##### 6.3.2.2.6. By Therapeutic Class

##### 6.3.2.2.7. By End User

#### 6.3.3. Mexico Head and Neck Cancer Therapeutics Market Outlook

##### 6.3.3.1. Market Size & Forecast

##### 6.3.3.1.1. By Value

##### 6.3.3.2. Market Share & Forecast

##### 6.3.3.2.1. By Type

##### 6.3.3.2.2. By Diagnostic Methods

##### 6.3.3.2.3. By Treatment Type

##### 6.3.3.2.4. By Disease Indication

##### 6.3.3.2.5. By Route of Administration

##### 6.3.3.2.6. By Therapeutic Class

##### 6.3.3.2.7. By End User

## 7. EUROPE HEAD AND NECK CANCER THERAPEUTICS MARKET OUTLOOK

### 7.1. Market Size & Forecast

#### 7.1.1. By Value

### 7.2. Market Share & Forecast

#### 7.2.1. By Type

#### 7.2.2. By Diagnostic Methods

#### 7.2.3. By Treatment Type

#### 7.2.4. By Disease Indication

#### 7.2.5. By Route of Administration

#### 7.2.6. By Therapeutic Class

#### 7.2.7. By End User

#### 7.2.8. By Country

### 7.3. Europe: Country Analysis

#### 7.3.1. Germany Head and Neck Cancer Therapeutics Market Outlook

##### 7.3.1.1. Market Size & Forecast

##### 7.3.1.1.1. By Value

##### 7.3.1.2. Market Share & Forecast

##### 7.3.1.2.1. By Type

- 7.3.1.2.2. By Diagnostic Methods
- 7.3.1.2.3. By Treatment Type
- 7.3.1.2.4. By Disease Indication
- 7.3.1.2.5. By Route of Administration
- 7.3.1.2.6. By Therapeutic Class
- 7.3.1.2.7. By End User
- 7.3.2. France Head and Neck Cancer Therapeutics Market Outlook
  - 7.3.2.1. Market Size & Forecast
    - 7.3.2.1.1. By Value
  - 7.3.2.2. Market Share & Forecast
    - 7.3.2.2.1. By Type
    - 7.3.2.2.2. By Diagnostic Methods
    - 7.3.2.2.3. By Treatment Type
    - 7.3.2.2.4. By Disease Indication
    - 7.3.2.2.5. By Route of Administration
    - 7.3.2.2.6. By Therapeutic Class
    - 7.3.2.2.7. By End User
- 7.3.3. United Kingdom Head and Neck Cancer Therapeutics Market Outlook
  - 7.3.3.1. Market Size & Forecast
    - 7.3.3.1.1. By Value
  - 7.3.3.2. Market Share & Forecast
    - 7.3.3.2.1. By Type
    - 7.3.3.2.2. By Diagnostic Methods
    - 7.3.3.2.3. By Treatment Type
    - 7.3.3.2.4. By Disease Indication
    - 7.3.3.2.5. By Route of Administration
    - 7.3.3.2.6. By Therapeutic Class
    - 7.3.3.2.7. By End User
- 7.3.4. Italy Head and Neck Cancer Therapeutics Market Outlook
  - 7.3.4.1. Market Size & Forecast
    - 7.3.4.1.1. By Value
  - 7.3.4.2. Market Share & Forecast
    - 7.3.4.2.1. By Type
    - 7.3.4.2.2. By Diagnostic Methods
    - 7.3.4.2.3. By Treatment Type
    - 7.3.4.2.4. By Disease Indication
    - 7.3.4.2.5. By Route of Administration
    - 7.3.4.2.6. By Therapeutic Class
    - 7.3.4.2.7. By End User

### 7.3.5. Spain Head and Neck Cancer Therapeutics Market Outlook

#### 7.3.5.1. Market Size & Forecast

##### 7.3.5.1.1. By Value

#### 7.3.5.2. Market Share & Forecast

##### 7.3.5.2.1. By Type

##### 7.3.5.2.2. By Diagnostic Methods

##### 7.3.5.2.3. By Treatment Type

##### 7.3.5.2.4. By Disease Indication

##### 7.3.5.2.5. By Route of Administration

##### 7.3.5.2.6. By Therapeutic Class

##### 7.3.5.2.7. By End User

## **8. ASIA PACIFIC HEAD AND NECK CANCER THERAPEUTICS MARKET OUTLOOK**

### 8.1. Market Size & Forecast

#### 8.1.1. By Value

### 8.2. Market Share & Forecast

#### 8.2.1. By Type

#### 8.2.2. By Diagnostic Methods

#### 8.2.3. By Treatment Type

#### 8.2.4. By Disease Indication

#### 8.2.5. By Route of Administration

#### 8.2.6. By Therapeutic Class

#### 8.2.7. By End User

#### 8.2.8. By Country

### 8.3. Asia Pacific: Country Analysis

#### 8.3.1. China Head and Neck Cancer Therapeutics Market Outlook

##### 8.3.1.1. Market Size & Forecast

##### 8.3.1.1.1. By Value

##### 8.3.1.2. Market Share & Forecast

##### 8.3.1.2.1. By Type

##### 8.3.1.2.2. By Diagnostic Methods

##### 8.3.1.2.3. By Treatment Type

##### 8.3.1.2.4. By Disease Indication

##### 8.3.1.2.5. By Route of Administration

##### 8.3.1.2.6. By Therapeutic Class

##### 8.3.1.2.7. By End User

#### 8.3.2. India Head and Neck Cancer Therapeutics Market Outlook

##### 8.3.2.1. Market Size & Forecast

- 8.3.2.1.1. By Value
- 8.3.2.2. Market Share & Forecast
  - 8.3.2.2.1. By Type
  - 8.3.2.2.2. By Diagnostic Methods
  - 8.3.2.2.3. By Treatment Type
  - 8.3.2.2.4. By Disease Indication
  - 8.3.2.2.5. By Route of Administration
  - 8.3.2.2.6. By Therapeutic Class
  - 8.3.2.2.7. By End User
- 8.3.3. Japan Head and Neck Cancer Therapeutics Market Outlook
  - 8.3.3.1. Market Size & Forecast
    - 8.3.3.1.1. By Value
  - 8.3.3.2. Market Share & Forecast
    - 8.3.3.2.1. By Type
    - 8.3.3.2.2. By Diagnostic Methods
    - 8.3.3.2.3. By Treatment Type
    - 8.3.3.2.4. By Disease Indication
    - 8.3.3.2.5. By Route of Administration
    - 8.3.3.2.6. By Therapeutic Class
    - 8.3.3.2.7. By End User
- 8.3.4. South Korea Head and Neck Cancer Therapeutics Market Outlook
  - 8.3.4.1. Market Size & Forecast
    - 8.3.4.1.1. By Value
  - 8.3.4.2. Market Share & Forecast
    - 8.3.4.2.1. By Type
    - 8.3.4.2.2. By Diagnostic Methods
    - 8.3.4.2.3. By Treatment Type
    - 8.3.4.2.4. By Disease Indication
    - 8.3.4.2.5. By Route of Administration
    - 8.3.4.2.6. By Therapeutic Class
    - 8.3.4.2.7. By End User
- 8.3.5. Australia Head and Neck Cancer Therapeutics Market Outlook
  - 8.3.5.1. Market Size & Forecast
    - 8.3.5.1.1. By Value
  - 8.3.5.2. Market Share & Forecast
    - 8.3.5.2.1. By Type
    - 8.3.5.2.2. By Diagnostic Methods
    - 8.3.5.2.3. By Treatment Type
    - 8.3.5.2.4. By Disease Indication

8.3.5.2.5. By Route of Administration

8.3.5.2.6. By Therapeutic Class

8.3.5.2.7. By End User

## **9. MIDDLE EAST & AFRICA HEAD AND NECK CANCER THERAPEUTICS MARKET OUTLOOK**

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Type

9.2.2. By Diagnostic Methods

9.2.3. By Treatment Type

9.2.4. By Disease Indication

9.2.5. By Route of Administration

9.2.6. By Therapeutic Class

9.2.7. By End User

9.2.8. By Country

9.3. Middle East & Africa: Country Analysis

9.3.1. Saudi Arabia Head and Neck Cancer Therapeutics Market Outlook

9.3.1.1. Market Size & Forecast

9.3.1.1.1. By Value

9.3.1.2. Market Share & Forecast

9.3.1.2.1. By Type

9.3.1.2.2. By Diagnostic Methods

9.3.1.2.3. By Treatment Type

9.3.1.2.4. By Disease Indication

9.3.1.2.5. By Route of Administration

9.3.1.2.6. By Therapeutic Class

9.3.1.2.7. By End User

9.3.2. UAE Head and Neck Cancer Therapeutics Market Outlook

9.3.2.1. Market Size & Forecast

9.3.2.1.1. By Value

9.3.2.2. Market Share & Forecast

9.3.2.2.1. By Type

9.3.2.2.2. By Diagnostic Methods

9.3.2.2.3. By Treatment Type

9.3.2.2.4. By Disease Indication

9.3.2.2.5. By Route of Administration

- 9.3.2.2.6. By Therapeutic Class
- 9.3.2.2.7. By End User
- 9.3.3. South Africa Head and Neck Cancer Therapeutics Market Outlook
  - 9.3.3.1. Market Size & Forecast
    - 9.3.3.1.1. By Value
  - 9.3.3.2. Market Share & Forecast
    - 9.3.3.2.1. By Type
    - 9.3.3.2.2. By Diagnostic Methods
    - 9.3.3.2.3. By Treatment Type
    - 9.3.3.2.4. By Disease Indication
    - 9.3.3.2.5. By Route of Administration
    - 9.3.3.2.6. By Therapeutic Class
    - 9.3.3.2.7. By End User

## **10. SOUTH AMERICA HEAD AND NECK CANCER THERAPEUTICS MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value
- 10.2. Market Share & Forecast
  - 10.2.1. By Type
  - 10.2.2. By Diagnostic Methods
  - 10.2.3. By Treatment Type
  - 10.2.4. By Disease Indication
  - 10.2.5. By Route of Administration
  - 10.2.6. By Therapeutic Class
  - 10.2.7. By End User
  - 10.2.8. By Country
- 10.3. South America: Country Analysis
  - 10.3.1. Brazil Head and Neck Cancer Therapeutics Market Outlook
    - 10.3.1.1. Market Size & Forecast
      - 10.3.1.1.1. By Value
    - 10.3.1.2. Market Share & Forecast
      - 10.3.1.2.1. By Type
      - 10.3.1.2.2. By Diagnostic Methods
      - 10.3.1.2.3. By Treatment Type
      - 10.3.1.2.4. By Disease Indication
      - 10.3.1.2.5. By Route of Administration
      - 10.3.1.2.6. By Therapeutic Class

- 10.3.1.2.7. By End User
- 10.3.2. Colombia Head and Neck Cancer Therapeutics Market Outlook
  - 10.3.2.1. Market Size & Forecast
    - 10.3.2.1.1. By Value
  - 10.3.2.2. Market Share & Forecast
    - 10.3.2.2.1. By Type
    - 10.3.2.2.2. By Diagnostic Methods
    - 10.3.2.2.3. By Treatment Type
    - 10.3.2.2.4. By Disease Indication
    - 10.3.2.2.5. By Route of Administration
    - 10.3.2.2.6. By Therapeutic Class
    - 10.3.2.2.7. By End User
- 10.3.3. Argentina Head and Neck Cancer Therapeutics Market Outlook
  - 10.3.3.1. Market Size & Forecast
    - 10.3.3.1.1. By Value
  - 10.3.3.2. Market Share & Forecast
    - 10.3.3.2.1. By Type
    - 10.3.3.2.2. By Diagnostic Methods
    - 10.3.3.2.3. By Treatment Type
    - 10.3.3.2.4. By Disease Indication
    - 10.3.3.2.5. By Route of Administration
    - 10.3.3.2.6. By Therapeutic Class
    - 10.3.3.2.7. By End User

## **11. MARKET DYNAMICS**

- 11.1. Drivers
- 11.2. Challenges

## **12. MARKET TRENDS & DEVELOPMENTS**

- 12.1. Merger & Acquisition (If Any)
- 12.2. Product Launches (If Any)
- 12.3. Recent Developments

## **13. GLOBAL HEAD AND NECK CANCER THERAPEUTICS MARKET: SWOT ANALYSIS**

## **14. PORTER'S FIVE FORCES ANALYSIS**

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Products

## **15. COMPETITIVE LANDSCAPE**

- 15.1. Eli Lilly and Company
  - 15.1.1. Business Overview
  - 15.1.2. Products & Services
  - 15.1.3. Recent Developments
  - 15.1.4. Key Personnel
  - 15.1.5. SWOT Analysis
- 15.2. Merck & Co., Inc.
- 15.3. F. Hoffmann-La Roche Ltd.
- 15.4. Bristol-Myers Squibb Company
- 15.5. AstraZeneca plc
- 15.6. Pfizer Inc.
- 15.7. Sanofi S.A.
- 15.8. Novartis AG
- 15.9. Amgen Inc.
- 15.10. Boehringer Ingelheim International GmbH

## **16. STRATEGIC RECOMMENDATIONS**

## **17. ABOUT US & DISCLAIMER**

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Product name: Head and Neck Cancer Therapeutics Market- Global Industry Size, Share, Trends, Opportunity and Forecast, Segmented By Type (Diagnostic Methods, Treatment Type), By Diagnostic Methods (Biopsy, Imaging, Endoscopy, Others), By Treatment Type (Surgery, Radiation Therapy, Chemotherapy, Immunotherapy, Targeted Therapy), By Disease Indication (Lip and Oral Cavity Cancer, Laryngeal Cancer, Oropharyngeal Cancer, Salivary Gland Cancer, Nasopharyngeal Cancer, Hypopharyngeal Cancer), By Route of Administration (Injectable, Oral), By Therapeutic Class (PD Inhibitors, EGFR Inhibitors, Microtubule Inhibitors), By End User (Hospitals, Specialty Clinics, Ambulatory Surgical Centers, Others), By Region & Competition, 2021-2031F

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