

# **Cancer Biological Therapy Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Cancer Growth Blockers, Monoclonal Antibodies, Vaccines), By Distribution Channel (Hospitals, Retail & Mail Order Pharmacies), By Region, and By Competition**

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## **Abstracts**

Global Cancer Biological Therapy Market has valued at USD 96.33 billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 7.55% through 2028. The global cancer biological therapy market refers to the rapidly evolving field of cancer treatment that utilizes biological agents, such as monoclonal antibodies, cytokines, and vaccines, to target and combat cancer cells. This market has witnessed significant growth and innovation over the years due to advances in biotechnology and a growing understanding of the molecular mechanisms underlying cancer.

### **Key Market Drivers**

#### **Rising Cancer Incidence**

Cancer has long been one of humanity's most formidable adversaries, affecting millions of lives across the globe. Recent years have witnessed a troubling surge in cancer incidence rates, with the disease becoming an ever-increasing public health concern. Paradoxically, this ominous trend has also created an environment ripe for innovation and advancement in the field of cancer treatment, particularly in the realm of cancer biological therapies.

According to data from the World Health Organization (WHO), the incidence of cancer

has been steadily climbing, with millions of new cases diagnosed each year. This upward trajectory is driven by a combination of factors, including an aging population, lifestyle changes, environmental factors, and improved cancer detection methods.

The escalating cancer burden has created a pressing need for more effective and targeted treatments. Conventional treatments like chemotherapy and radiation therapy, while valuable, often come with severe side effects and limited efficacy. Biological therapies, on the other hand, offer the promise of better outcomes with fewer side effects. The genetic diversity of cancer is well-documented, and this diversity often necessitates personalized treatment approaches. Biological therapies, such as targeted therapies, are designed to pinpoint specific molecular abnormalities or mutations in cancer cells. This precision allows for the development of tailored treatment plans, increasing their effectiveness. Immunotherapy, a subset of biological therapy, has made remarkable strides in recent years. These treatments harness the body's immune system to identify and attack cancer cells, offering the potential for long-lasting remissions and even cures. The increasing prevalence of immunotherapies like checkpoint inhibitors and CAR-T cell therapy is directly tied to their success in treating various cancer types. The pharmaceutical industry has responded to the rising cancer incidence by investing heavily in research and development. As the demand for more effective treatments grows, pharmaceutical companies are racing to develop and bring to market innovative cancer biological therapies, creating a competitive and dynamic landscape. Genetic testing and molecular profiling have become integral to cancer diagnosis and treatment planning. As the understanding of cancer genetics deepens, personalized medicine approaches are being employed to tailor cancer biological therapies to individual patients, optimizing treatment outcomes. The surge in cancer cases has prompted an increase in clinical trials for novel biological therapies. Regulatory agencies have also streamlined approval processes to expedite promising treatments to patients, further facilitating market growth. The global cancer biological therapy market is expanding beyond traditional markets, with emerging economies in Asia, Latin America, and the Middle East witnessing rapid growth. Improved healthcare infrastructure and increasing awareness of advanced cancer treatments are contributing to this expansion.

### Advancements in Biotechnology

Biotechnology has emerged as a game-changer in the field of cancer treatment, revolutionizing the way we combat this complex and devastating disease.

Advancements in biotechnology have led to the development of innovative and highly

targeted cancer biological therapies that offer new hope for patients worldwide.

Biotechnology encompasses a broad spectrum of techniques and technologies that leverage biological systems, living organisms, or their derivatives to develop new products and processes. In the context of cancer treatment, biotechnology has become instrumental in understanding the underlying mechanisms of the disease, discovering novel therapeutic targets, and designing precision treatments.

Advances in biotechnology have deepened our understanding of the molecular and genetic basis of cancer. Researchers can now identify specific genetic mutations, biomarkers, and signaling pathways that drive tumor growth. This knowledge has paved the way for the development of targeted therapies, a cornerstone of cancer biological treatments.

Biotechnology has facilitated the production of monoclonal antibodies, which are engineered to bind to specific antigens on cancer cells. These antibodies can either block the growth signals of cancer cells or trigger the immune system to attack them. Monoclonal antibodies like trastuzumab (Herceptin) and rituximab (Rituxan) have revolutionized cancer treatment, particularly in breast and blood cancers.

Biotechnological advancements have enabled the development of cancer vaccines designed to stimulate the patient's immune system to recognize and attack cancer cells. Vaccines such as Provenge (sipuleucel-T) for prostate cancer and various therapeutic cancer vaccine candidates have shown promise in clinical trials.

Gene therapy, a cutting-edge biotechnological approach, involves modifying a patient's own genes to treat or prevent disease. In the context of cancer biological therapy, gene therapies are being developed to target and correct genetic mutations responsible for cancer. CAR-T cell therapies, which genetically engineer a patient's immune cells to fight cancer, exemplify this innovation.

Biotechnology has transformed drug discovery processes. High-throughput screening, computational biology, and bioinformatics tools enable researchers to identify potential drug candidates more efficiently. This has led to the discovery of novel molecules for cancer treatment.

Biotechnology has facilitated the discovery and validation of biomarkers, which are crucial for patient stratification and treatment response prediction. Biomarker-driven approaches help identify patients who are most likely to benefit from specific cancer

biological therapies, making treatments more effective and personalized.

Biotechnology has improved bioprocessing and manufacturing techniques, ensuring the scalable production of biological therapies. This has lowered production costs and increased the availability of these treatments.

### Immunotherapy Revolution

Immunotherapy, a groundbreaking approach to cancer treatment, has ignited a revolution in the field of oncology. This remarkable advancement harnesses the body's immune system to fight cancer cells, providing hope to patients and transforming the landscape of cancer care.

Immunotherapy represents a paradigm shift in cancer treatment. Unlike traditional therapies like chemotherapy and radiation, which directly target cancer cells, immunotherapy focuses on strengthening the body's own defenses against cancer. It stimulates the immune system to recognize and destroy cancer cells, offering several advantages.

Immunotherapy is highly precise. It targets only cancer cells while sparing healthy tissues, minimizing side effects. Some immunotherapies can induce durable responses, with the potential for sustained remission or even cures. Immunotherapy has expanded the arsenal of treatment options, particularly for advanced and hard-to-treat cancers.

Immunotherapy has demonstrated efficacy in various cancer types, including melanoma, lung, bladder, and kidney cancers, among others. As research continues, the potential applications of immunotherapy are expected to grow, widening its reach in the market. Checkpoint inhibitors are a class of immunotherapies that block proteins that inhibit the immune response, allowing the immune system to recognize and attack cancer cells. Drugs like pembrolizumab (Keytruda) and nivolumab (Opdivo) have achieved remarkable success in clinical trials and have been approved for multiple indications, fueling market growth. CAR-T cell therapy is a type of immunotherapy that involves modifying a patient's T cells to express chimeric antigen receptors (CARs), which can recognize and target cancer cells. CAR-T therapies have shown exceptional results in treating certain blood cancers, such as leukemia and lymphoma. Researchers are exploring the potential of combining immunotherapies with other treatments, such as chemotherapy and targeted therapies. These combination approaches aim to enhance the effectiveness of cancer treatment and broaden the scope of immunotherapy applications. The ongoing research and development of

immunotherapies through clinical trials are expanding the portfolio of available treatments. New immunotherapeutic agents and novel combinations are continuously being tested, driving innovation and market growth.

## Targeted Therapies

Targeted therapies represent a transformative approach to cancer treatment, offering new hope to patients by directly targeting the molecular and genetic abnormalities that drive cancer growth. In recent years, these precise and innovative treatments have played a pivotal role in shaping the landscape of the global cancer biological therapy market.

Targeted therapies minimize harm to healthy tissues, reducing the often-debilitating side effects associated with traditional treatments. By directly addressing the underlying genetic or molecular drivers of cancer, targeted therapies can be more effective, especially in cancers where traditional treatments have limited impact. Targeted therapies are often tailored to individual patients based on genetic or molecular profiling, allowing for personalized treatment plans.

Advances in genomics and molecular biology have led to the discovery of numerous biomarkers and genetic mutations that drive cancer. Targeted therapies are developed to specifically address these aberrations, enabling more precise treatments. The pharmaceutical industry has invested heavily in research and development, leading to the creation of a wide range of targeted therapies. Drugs like imatinib (Gleevec), which targets the BCR-ABL gene in chronic myeloid leukemia (CML), have achieved remarkable success. Targeted therapies have demonstrated efficacy in various cancer types, including breast, lung, colorectal, and melanoma. As researchers uncover new targetable mutations, the scope of targeted therapy applications is expected to grow. Researchers are exploring the potential of combining targeted therapies with other treatments, such as immunotherapies and traditional chemotherapy. These combinations aim to enhance treatment effectiveness and broaden the range of treatable cancers. Ongoing clinical trials continue to expand the portfolio of available targeted therapies. New agents and innovative combinations are constantly being tested, driving innovation and market growth.

## Key Market Challenges

### High Costs and Accessibility

One of the most pressing challenges is the high cost associated with many cancers' biological therapies. These treatments can be expensive to develop, produce, and administer. Accessibility to these therapies becomes a critical issue, as not all patients can afford them, leading to disparities in care. Ensuring equitable access to these life-saving treatments remains a global challenge.

### Resistance to Treatment

Over time, some cancer cells can develop resistance to targeted therapies, rendering them less effective. This phenomenon, known as treatment resistance, can limit the long-term success of these therapies. Researchers are actively working to understand and address resistance mechanisms, but it remains a significant challenge in the field.

### Side Effects and Toxicities

While targeted therapies are often less toxic than traditional treatments like chemotherapy, they are not without side effects. Patients may experience adverse events, including skin reactions, gastrointestinal problems, and immune-related complications. Managing these side effects while maintaining treatment efficacy is a delicate balance.

### Key Market Trends

#### Immunotherapy Combinations

Immunotherapy has revolutionized cancer treatment, and the trend toward combining different immunotherapies or immunotherapy with other treatment modalities is expected to gain traction. Researchers are exploring the synergy between checkpoint inhibitors, CAR-T cell therapy, and cancer vaccines to enhance the effectiveness of immune-based therapies.

#### Biomarker-Driven Therapies

Precision medicine is increasingly guiding treatment decisions in oncology. The identification of novel biomarkers, including genetic mutations and molecular signatures, will continue to drive the development of highly targeted therapies. Biomarker-driven approaches ensure that patients receive the most appropriate treatment based on their unique tumor characteristics.



## CAR-T Cell Therapy Expansion

CAR-T cell therapy, a form of immunotherapy that modifies a patient's T cells to target cancer cells, is gaining momentum. As research progresses, we can anticipate the approval of CAR-T therapies for additional cancer types beyond blood cancers, further broadening their applications.

## Segmental Insights

### Product Insights

Based on the category of Product, it is anticipated that the antibodies sector will assume a leading position in 2022. Antibodies are poised for substantial growth in the foreseeable future, primarily owing to their capacity to precisely target proteins on the cell surface. This precision makes them increasingly valuable in cancer therapy. Furthermore, the growing preference among patients for advanced biological therapies for cancer, which aim to mitigate the risks associated with traditional anti-cancer drug treatments, will fuel the expansion of this segment.

These laboratory-produced antibodies are designed to combat protein molecules expressed by malignant tumors. Examples of antibody medications in this category include rituximab, employed in the treatment of non-lymphoma; Hodgkin's alemtuzumab (Campath), utilized in the management of chronic leukemia (CLL); and ipilimumab (Yervoy), employed in the treatment of malignant melanoma. Moreover, the growing inclination towards advanced biological treatments for cancer, as a means to reduce the risks tied to conventional anti-cancer drugs, is poised to bring about significant growth within this segment. For instance, in the case of breast cancer, trastuzumab (Herceptin, Kanjinti, Ogivri) serves as an exemplar of a laboratory-developed antibody. It operates by impeding the proliferation of cancer cells through targeted adherence to specific regions on these cells.

## Distribution Channel Insights

Retail and mail-order pharmacies are expected to command a substantial market share in the Global Cancer Biological Therapy Market during the forecast period for several compelling reasons. Firstly, the increasing prevalence of cancer worldwide necessitates easy access to advanced therapies, and retail and mail-order pharmacies provide a convenient distribution channel for these treatments. Moreover, as patients and healthcare providers increasingly opt for personalized cancer therapies, the ability of

retail and mail-order pharmacies to offer a wide range of biological therapies tailored to individual patient needs positions them favorably in the market. Additionally, the global trend toward home-based healthcare services further accentuates the significance of these pharmacies, as they enable patients to access and receive cancer biological therapies in the comfort of their homes, promoting greater patient compliance and treatment effectiveness. As a result, the retail and mail-order pharmacy segment is poised to play a pivotal role in the growth and accessibility of cancer biological therapies during the forecast period.

## Regional Insights

In the cancer biological therapy market from 2023 to 2032, North America takes the lead as the prominent region. The United States, in particular, emerges as the frontrunner both within North America and globally, attributed to a favorable reimbursement landscape coupled with substantial healthcare spending. Furthermore, the U.S. market benefits from an extensive network of cancer biological vaccine and drug manufacturers, bolstered by increased investments in research and development and government initiatives. Accessible health insurance policies covering life-threatening conditions incentivize individuals to seek these therapies, thereby driving market growth. The U.S. cancer gene therapy market has also witnessed significant expansion, thanks to a robust treatment pipeline and the increasing focus of industry players on pioneering cancer gene therapies and their delivery systems. An illustrative example of this trend is the extended collaboration agreement between the Cancer Institute, Inc. and McKesson Corporation announced on June 27, 2022.

In the second position for market profitability is Europe, owing to its high disposable income levels and widespread awareness. The region's substantial cancer burden, a significant elderly patient population, and advancements in cancer therapies further contribute to the potential for market growth in the upcoming years. Additionally, the introduction of novel molecular techniques, an evolving healthcare sector, and innovative technological approaches are expected to further augment the European market's prospects.

## Key Market Players

F Hoffmann-La Roche AG

Novartis AG



Merck & Co., Inc.

Amgen Inc

GSK PLC

Celgene Corp

Pfizer Inc

Zydus Lifesciences Ltd

Sun Pharmaceutical Industries Ltd

Bayer AG

Report Scope:

In this report, the Global Cancer Biological Therapy Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Cancer Biological Therapy Market, By Product:

Cancer Growth Blockers

Monoclonal Antibodies

Vaccines

Cancer Biological Therapy Market, By Distribution Channel:

Hospitals

Retail & Mail Order Pharmacies

Cancer Biological Therapy Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

## Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Cancer Biological Therapy Market.

## Available Customizations:

Global Cancer Biological Therapy market report with the given market data, Tech Sci 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).

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