

Chemotherapy Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028F Segmented By Type (Alkylating Agents, Anti-metabolites, Anti-Tumor Antibiotics, Hormones, Monoclonal Antibodies, Others), By Indication (Oncology/Cancer, Bone Marrow Diseases, Immune System Disorders, Others), By Dosage Form (Capsule, Tablets, Injections, Others), By Route of Administration (Oral, Parenteral, Others), By End User (Hospitals, Specialty Clinics, Others), By Region and Competition

<https://marketpublishers.com/r/CAB154005572EN.html>

Date: September 2023

Pages: 190

Price: US\$ 4,900.00 (Single User License)

ID: CAB154005572EN

Abstracts

The global Chemotherapy Market was valued at USD 8.26 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 8.51% through 2028. Cancer, as stated by the World Health Organization (WHO), is the second leading cause of mortality worldwide, resulting in an estimated 9.6 million deaths in 2018. Given the rising cancer rates, there will be an increased demand for chemotherapy medications. Chemotherapy is a cancer treatment approach that utilizes potent chemicals to target and eliminate rapidly dividing cells within the body. It has proven efficacy in reducing cancer cell count, impeding cancer progression, and shrinking tumors.

Chemotherapy, often administered alone or in combination, is a versatile treatment modality for a wide range of cancers. It serves as a primary or sole treatment, eliminating hidden cancer cells and preparing patients for other interventions such as

radiation or surgery. Additionally, it can be employed to alleviate cancer-related signs and symptoms by selectively targeting cancer cells.

Key Market Drivers

Rising Incidences of Cancers

The increasing prevalence of cancer is projected to drive the growth rate of the chemotherapy drug market. According to the World Health Organization (WHO), cancer is the leading cause of mortality worldwide, accounting for approximately 10 million deaths in 2020, or nearly one in every six deaths. Each year, around 400,000 children receive a cancer diagnosis. Cervical cancer ranks as the most common cancer in 23 countries across the globe. Chemotherapy, often used in conjunction with other cancer treatments, remains the predominant approach to cancer treatment. Neo-adjuvant chemotherapy refers to chemotherapy administered prior to surgery and radiation therapy to reduce tumor size, while adjuvant chemotherapy is administered after surgery or radiation therapy to further shrink the tumor.

Increasing Investment in Healthcare Infrastructure

Another significant factor impacting the growth rate of the chemotherapy drug market is the increasing healthcare expenditure, which contributes to the improvement of its infrastructure. Moreover, various government organizations are committed to enhancing healthcare infrastructure through increased funding, thereby influencing market dynamics. Increased investment allows for the establishment and expansion of specialized cancer treatment centers equipped with state-of-the-art facilities for chemotherapy administration, monitoring, and supportive care. Healthcare infrastructure investment ensures that patients have access to oncologists, hematologists, pathologists, radiologists, and other specialists who play critical roles in planning and delivering chemotherapy treatments. Well-equipped healthcare facilities can provide accurate and timely cancer diagnoses through advanced imaging technologies, biopsies, and molecular testing, guiding the selection of appropriate chemotherapy regimens. Adequate infrastructure supports the conduct of clinical trials, allowing patients to access innovative chemotherapy treatments and contributing to the development of new therapeutic options. Furthermore, the expanding geriatric population and the growing demand for advanced cancer drugs will drive the expansion of the chemotherapy drug market. Additionally, the growing awareness of chemotherapy, coupled with the rising number of patients undergoing chemotherapy and radiotherapy treatments, is expected to augment the market's growth.

Increasing Geriatric Population

The increase in the geriatric population worldwide, coupled with a rising prevalence of chronic diseases, is driving the market's growth during the forecast period. It is worth noting that the number and proportion of individuals aged 60 years and older in the population reached 1 billion in 2019, and this figure is projected to rise to 1.4 billion by 2030 and 2.1 billion by 2050. Moreover, improved reimbursement policies in advanced economies are expected to contribute to the market's expansion. Additionally, the market will be propelled by the growing patient population globally and advancements in healthcare infrastructure.

Furthermore, the escalating incidence of cancer worldwide is a significant factor driving market growth. According to the World Health Organization, approximately 10 million people succumbed to cancer in 2020. Notably, lung cancer accounted for the highest number of deaths, with 1.80 million fatalities, followed by colon and rectum cancer (916,000 deaths), liver cancer (830,000 deaths), stomach cancer (769,000 deaths), and breast cancer (685,000 deaths). Additionally, it has been observed that about 30% of cancer cases in low and lower-middle-income countries are caused by cancer-causing agents such as the human papillomavirus (HPV) and hepatitis. Moreover, increased investments in research and development activities to develop more effective medical solutions, coupled with the launch of new products, are expected to drive the growth of the global chemotherapy market throughout the forecast period.

Increasing Research & Development Activities

R&D efforts are focused on identifying specific molecular targets in cancer cells that can be exploited for treatment. Targeted therapies aim to attack cancer cells while minimizing damage to healthy cells, reducing side effects, and improving treatment efficacy. Advancements in genomics and molecular profiling enable the development of personalized chemotherapy regimens tailored to an individual patient's genetic makeup and cancer characteristics. This approach enhances treatment precision and increases the likelihood of positive responses. R&D leads to the discovery and development of new chemotherapy drugs with different mechanisms of action. These drugs may have improved efficacy, reduced toxicity, and novel ways of combating drug resistance. Researchers are exploring combinations of chemotherapy agents with other treatments, such as immunotherapy, targeted therapy, and radiation therapy. These combinations can enhance the overall therapeutic effect and overcome resistance. Innovative drug delivery systems, including nanoparticles, liposomes, and implants, improve the

pharmacokinetics and bioavailability of chemotherapy drugs, enhancing their effectiveness and reducing side effects. R&D aims to understand the mechanisms of drug resistance and develop strategies to overcome it, allowing for the prolonged effectiveness of chemotherapy treatments. Researchers work on developing chemotherapy agents that have fewer and less severe side effects, improving patients' quality of life during treatment.

Key Market Challenges

High Cost of Treatment

The high cost associated with chemotherapy drugs poses a significant obstacle to the growth of the market. High chemotherapy costs can create financial barriers for patients, leading to delayed or deferred treatment, non-adherence to prescribed regimens, and reduced treatment effectiveness. Patients with limited financial resources may face disparities in accessing chemotherapy treatments, exacerbating existing healthcare inequalities. High costs can influence patients' treatment decisions, potentially leading to suboptimal choices based on financial considerations rather than medical necessity. The financial strain of chemotherapy can lead to reduced treatment access, particularly for uninsured or underinsured patients. Moreover, the shortage of skilled professionals and inadequate healthcare infrastructure in developing economies present challenges to the chemotherapy drug market. Additionally, the side effects of these drugs, including heart problems, decreased red blood cell count, fatigue, weight loss, hair loss, diarrhea, reduced lung, kidney, and liver function, decreased bone density, and limited awareness among the public, act as restraints and further hinder the market's growth during the forecast period of 2018-2028.

Adverse Health Effects by Treatment

Chemotherapy is often associated with a range of side effects, including nausea, vomiting, fatigue, hair loss, pain, and cognitive changes. These side effects can significantly diminish patients' quality of life and lead to physical and emotional distress. The prospect of experiencing severe side effects may lead some patients to avoid or delay chemotherapy treatment. Non-adherence can compromise treatment efficacy and hinder positive outcomes. Some chemotherapy drugs may have potential long-term health consequences, such as organ damage or secondary cancers, which can impact patients' willingness to undergo treatment.

Key Market Trends

Development of Innovative Technology

Chemotherapy has played a pivotal role in extending the lifespan of cancer patients, surpassing their expected survival by several years. The latest breakthrough in the field of chemotherapy involves the administration of specially designed nanoparticles containing cancer-fighting medications, which selectively target affected areas while sparing healthy cells. This innovative approach has demonstrated remarkable efficacy in eradicating malignant cells while preserving surrounding healthy tissue. By utilizing photon lasers, medical professionals are able to precisely monitor the release, duration, and distribution of these medication-loaded nanoparticles within the patient's body. Excitingly, the University of California, Los Angeles, is currently conducting a clinical trial to evaluate the effectiveness of this approach, which has shown promising outcomes in the treatment of early-stage cancer patients. With its imminent entry into the chemotherapeutic market, this groundbreaking technique holds great potential for transforming cancer treatment.

Increase in the Number of Research and Development Activities

The growth of the chemotherapy drug market is driven by a rise in research and development activities, presenting advantageous opportunities for market expansion. Research initiatives focus on identifying new compounds, molecules, and mechanisms of action for chemotherapy drugs. The discovery of novel drugs expands the range of available treatment options and addresses unmet medical needs. R&D aims to develop targeted chemotherapy drugs that specifically attack cancer cells while minimizing harm to healthy cells. These therapies offer enhanced efficacy and reduced side effects. Research explores the synergistic effects of combining chemotherapy drugs with other treatment modalities, such as immunotherapy or targeted therapy, leading to more comprehensive and effective cancer treatment regimens. R&D efforts identify biomarkers that can predict patient responses to specific chemotherapy drugs, enabling personalized treatment selection and improving treatment outcomes. Ongoing research leads to the development of optimized drug formulations, including extended-release formulations, nanoparticles, and liposomes, enhancing drug delivery, bioavailability, and patient compliance. Additionally, the increasing number of emerging markets and new product launches during the forecast period will further contribute to the positive prospects for the growth of the chemotherapy drug market.

Segmental Insights

Type Insights

The chemotherapy market is segmented based on drug class, including Alkylating Agents, Anti-metabolites, Anti-Tumor Antibiotics, Hormones, Monoclonal Antibodies, and Others. The alkylating agent segment currently holds the dominant position in the market. Alkylating substances are known to cause DNA strand breakage, odd base pairing, or cross-linking of DNA strands, which ultimately obstruct cell division. Moreover, alkylating chemicals are generally regarded as cell cycle phase nonspecific, as they have the ability to eliminate cells at various points in the cell cycle. As cancer rates continue to rise globally, the market for anti-metabolite drugs is projected to witness significant expansion. Additionally, the growth of the anti-metabolite medication sector can also be attributed to increased pipeline research and the escalating healthcare costs.

Route of Administration Insights

The oral category, being the largest contributor in the market, is expected to demonstrate significant expansion throughout the projected period. An oral cancer treatment medication is available in the form of pills, capsules, or liquids. Home, reducing the need for frequent visits to healthcare facilities for IV infusions. This can be particularly beneficial for patients who live far from treatment centers. The ability to take chemotherapy drugs at home can lead to a better quality of life for patients, as they have more flexibility and control over their treatment schedule. Oral chemotherapy may help reduce the need for hospital stays and associated costs compared to intravenous treatments, resulting in potential healthcare cost savings. Oral chemotherapy minimizes the disruption of patients' daily routines and activities, allowing them to continue working, spending time with family, and engaging in other normal activities. However, the intravenous route has exhibited the most rapid growth rate. Due to their intravenous administration, chemotherapy drugs act more swiftly compared to oral and topical treatments, as they are rapidly absorbed into the bloodstream.

Regional Insights

The North American chemotherapy market is poised to dominate the industry, driven by multiple manufacturers of chemotherapy drugs and increased healthcare spending. Accessibility to medical facilities and the application of cutting-edge technology in cancer research and treatment further contribute to its growth.

Europe's chemotherapy market holds the second-largest market share, fueled by the

ease of regulatory approval for novel cancer therapies, rising cancer incidence, and significant R&D investments by major companies in the market. Notably, the German chemotherapy market boasts the largest market share, while the UK chemotherapy market exhibits the highest growth rate in the European region.

The Asia-Pacific Chemotherapy Market is projected to experience rapid expansion from 2023 to 2028. This can be attributed to government awareness initiatives and escalating healthcare costs in the region. The availability of trained healthcare providers and the increasing demand for chemotherapy drugs, coupled with the expanding accessibility of generic medications, are expected to moderate the market's growth rate. Additionally, China's chemotherapy market commands the largest market share, and the Indian chemotherapy market demonstrates the highest growth rate in the Asia-Pacific region.

Key Market Players

F. Hoffmann-La Roche Ltd.

Mylan N.V.

Teva Pharmaceutical Industries Ltd.

Sanofi

Pfizer Inc.

GlaxoSmithKline plc

Novartis AG

Bayer AG

Eli Lilly and Company

Merck & Co., Inc.

Report Scope:

In this report, the Global Chemotherapy Market has been segmented into the following

Chemotherapy Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028F Segmented By...

categories, in addition to the industry trends, which have also been detailed below:

Chemotherapy Market, By Type:

Alkylating Agents

Anti-metabolites

Anti-Tumor Antibiotics

Hormones

Monoclonal Antibodies

Others

Chemotherapy Market, By Indication:

Oncology/Cancer

Bone Marrow Diseases

Immune System Disorders

Others

Chemotherapy Market, By Dosage Form:

Capsule

Tablets

Injections

Others

Chemotherapy Market, By Route of Administration:

Oral

Parenteral

Others

Chemotherapy Market, By End User:

Hospitals

Specialty Clinics

Others

Chemotherapy 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

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Chemotherapy Market.

Available Customizations:

Global Chemotherapy market report with the given market data, Tech Sci Research

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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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