

# **India Liver Cancer Therapeutics Market By Cancer Type (Hepatocellular Carcinoma, Cholangiocarcinoma, Hepatoblastoma, Angiosarcoma, Liver Metastasis), By Therapy (Targeted Therapy, Chemotherapy and Radiation Therapy, Immunotherapy, Others), By Route of Administration (Oral, Intravenous, Others), By Distribution Channel (Hospital Pharmacies, Retail Pharmacies, Online Pharmacies), By Region, Competition, Forecast & Opportunities, 2020-2030F**

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## **Abstracts**

India Liver Cancer Therapeutics Market was valued at USD 54.08 Million in 2024 and is expected to reach USD 90.55 Million by 2030 with a CAGR of 9.17% during the forecast period. The liver cancer therapeutics market in India has witnessed notable advancements and transformations in recent years, driven by the rising incidence of liver cancer and the growing demand for effective treatment options. Liver cancer, or hepatocellular carcinoma (HCC), is a significant health concern in India due to the prevalence of risk factors such as hepatitis B and C infections, alcohol consumption, and non-alcoholic fatty liver disease (NAFLD).

The Indian liver cancer therapeutics market is primarily segmented into drug classes, including targeted therapies, immunotherapies, and chemotherapy. Targeted therapies, which aim to specifically attack cancer cells while sparing healthy tissues, have gained substantial traction. Drugs such as Sorafenib, which is a first-line treatment for advanced liver cancer, have become a cornerstone in managing the disease. The

introduction of newer targeted therapies like Lenvatinib and Cabozantinib has further broadened the treatment landscape, providing patients with additional options that can potentially improve outcomes and quality of life.

Immunotherapy is another burgeoning segment within the market. Immune checkpoint inhibitors, such as Pembrolizumab and Nivolumab, are revolutionizing cancer treatment by enhancing the body's own immune response against cancer cells. The ongoing research and clinical trials focused on immunotherapeutic agents hold promise for more effective and personalized treatment regimens in the future. The growing emphasis on precision medicine is also reflected in the development of biomarker-driven therapies, which offer targeted approaches based on individual patient profiles.

Despite these advancements, the market faces several challenges. High treatment costs, limited awareness among the rural population, and infrastructural constraints in healthcare delivery are significant barriers. Addressing these issues requires a multifaceted approach, including strengthening public health initiatives, improving early detection and screening programs, and expanding healthcare access across different regions.

## Key Market Drivers

### Increasing Incidence of Liver Cancer

The rising incidence of liver cancer in India has emerged as a significant driver for the country's liver cancer therapeutics market. Hepatocellular carcinoma (HCC), the most common form of liver cancer, poses a substantial public health challenge in India, a nation with one of the highest rates of liver cancer globally. The increasing prevalence of this malignancy is reshaping the landscape of the liver cancer therapeutics market, fueling growth and driving innovation in treatment options.

According to data from the Global Cancer Observatory (GLOBOCAN) 2020, liver cancer ranks as the tenth most prevalent cancer in India, with an annual incidence of 34,743 new cases and 33,793 deaths.

Liver cancer incidence in India is influenced by a confluence of risk factors, including chronic hepatitis B and C infections, alcohol abuse, and non-alcoholic fatty liver disease (NAFLD). The World Health Organization (WHO) and various national health agencies have highlighted that the prevalence of hepatitis B and C is alarmingly high in India, contributing significantly to the rising cases of liver cancer. According to recent

epidemiological studies, liver cancer has become a leading cause of cancer-related deaths in the country, underscoring the urgent need for effective therapeutic interventions.

The recent review titled 'Epidemiology of Hepatocellular Carcinoma in India — An Updated Review for 2024,' published in ScienceDirect's Journal of Clinical and Experimental Hepatology, highlights a significant shift in liver cancer patterns. It reports that up to 30 percent of liver cancer cases are now being identified without the presence of underlying liver cirrhosis, traditionally seen as a precursor to the disease. Additionally, the study identifies Maharashtra, Gujarat, Kerala, and Goa as emerging hotspots for hepatocellular carcinoma (HCC), the most prevalent form of liver cancer originating in the liver's primary cells, hepatocytes.

In response to this growing health crisis, the liver cancer therapeutics market in India is expanding rapidly. The increase in liver cancer cases is propelling demand for advanced treatment options, which is stimulating market growth. Pharmaceutical companies are investing heavily in research and development to bring new and innovative therapies to the market. The focus has shifted towards targeted therapies and immunotherapies, which offer more effective and personalized treatment approaches compared to traditional chemotherapy. Targeted drugs like Sorafenib, Lenvatinib, and Cabozantinib are becoming integral to treatment regimens, providing patients with options that are more specific to their cancer profiles.

Immunotherapy is also gaining prominence as a result of the increasing liver cancer incidence. Immune checkpoint inhibitors, such as Pembrolizumab and Nivolumab, are demonstrating significant potential in clinical trials and early clinical use. These therapies enhance the body's immune response against cancer cells, offering new hope for patients with advanced liver cancer. The growth in immunotherapy research is partly driven by the increasing number of liver cancer cases, which necessitates the development of novel and effective treatment modalities.

### Advancements in Medical Technology

In recent years, the landscape of liver cancer treatment in India has undergone a significant transformation, largely driven by advancements in medical technology. This evolution is not only reshaping the approach to treating liver cancer but also serving as a pivotal factor in driving the growth of the Indian liver cancer therapeutics market. The convergence of cutting-edge technology and medical innovation is enhancing diagnostic accuracy, expanding treatment options, and ultimately improving patient outcomes.

One of the most influential advancements in medical technology is the development of targeted therapies. Unlike traditional treatments that employ a one-size-fits-all approach, targeted therapies are designed to specifically attack cancer cells while sparing healthy tissue. This precision is achieved through a deeper understanding of the genetic and molecular alterations that drive liver cancer. By focusing on these specific targets, therapies can be more effective and less toxic, leading to improved survival rates and quality of life for patients. The availability of such sophisticated treatments is significantly propelling the growth of the liver cancer therapeutics market in India, where the need for advanced treatment options is increasingly evident.

Another major technological advancement is the rise of immunotherapy, which leverages the body's own immune system to combat cancer. Immunotherapy has shown remarkable promise in treating various types of cancer, including liver cancer. Techniques such as checkpoint inhibitors, CAR-T cell therapy, and immune modulators are being integrated into clinical practice, offering new hope to patients who previously had limited options. The increasing adoption of these innovative therapies is contributing to the expansion of the liver cancer therapeutics market, as both healthcare providers and patients seek the latest and most effective treatment modalities.

In 2023, a pioneering study has highlighted a major advancement in liver cancer treatment. The research indicates that the combination of immunotherapy agents Atezolizumab and Bevacizumab has demonstrated substantial improvements in both overall and disease-free survival rates. Notably, in some cases, there has been complete tumor resolution when the disease is identified early and treated promptly. This real-world study, conducted in India by the Asian Institute of Gastroenterology (AIG), was recently published in the Journal of Clinical and Experimental Hepatology.

The development of minimally invasive surgical techniques is also playing a crucial role in the market's growth. Procedures such as radiofrequency ablation (RFA) and transarterial chemoembolization (TACE) are becoming more prevalent due to their reduced recovery times and lower risk profiles compared to traditional surgical methods. These techniques offer patients less invasive options with comparable efficacy, further driving the demand for advanced therapeutic solutions in liver cancer treatment.

Advancements in diagnostic technology are equally important in shaping the liver cancer therapeutics market. Innovations in imaging technologies, such as high-resolution ultrasound, magnetic resonance imaging (MRI), and computed tomography (CT) scans, have greatly improved the early detection and accurate staging of liver

cancer. Early diagnosis is crucial for effective treatment and better prognosis, and these technological advancements enable timely interventions that significantly influence market dynamics.

## Key Market Challenges

### High Cost of Treatment

The high cost of treatment remains one of the most pressing challenges in the India liver cancer therapeutics market. Liver cancer, or hepatocellular carcinoma (HCC), represents a significant health burden in India, where it is one of the leading causes of cancer-related deaths. Despite advancements in medical science, the prohibitive costs associated with its treatment create a substantial barrier to effective care for a large segment of the population.

India's healthcare system faces a paradox: while there has been substantial progress in medical technology and drug development, these advancements come with a high price tag that is often out of reach for many patients. Treatments for liver cancer typically include surgery, radiation, targeted therapies, and immunotherapies, each of which can be exorbitantly priced. For instance, newer therapies such as targeted kinase inhibitors and immune checkpoint inhibitors, though promising, can cost several lakhs per month. These costs are a significant burden on patients and their families, many of whom may already be grappling with the financial strain of a serious illness.

According to Cancer Rounds, the cost of liver cancer treatment can vary significantly depending on the cancer's stage. Globally, numerous treatment options are available for liver cancer. In India, however, patients can access high-quality liver cancer treatments at relatively affordable prices. The cost of liver cancer treatment in India typically ranges from USD 1,787.58 to USD 4,766.88.

The economic implications extend beyond the direct costs of medications and treatments. The high cost of liver cancer therapeutics contributes to a broader economic impact, affecting not only individual patients but also the healthcare system at large. Many patients resort to using their savings, selling assets, or incurring debt to afford these treatments, leading to financial instability. For some, the financial strain becomes so overwhelming that it results in a decision to forego or delay necessary treatment, which can adversely affect outcomes and overall survival rates.

The Indian government and private insurers face challenges in addressing these issues.

While efforts have been made to improve insurance coverage and reduce out-of-pocket expenses, the high cost of innovative treatments often exceeds the limits of standard health insurance plans. The insurance market in India is gradually evolving, but comprehensive coverage for high-cost cancer therapies remains limited. This gap in coverage further exacerbates the financial burden on patients.

## Key Market Trends

### Increased Focus on Early Detection

In the evolving landscape of the Indian liver cancer therapeutics market, the increased focus on early detection represents a pivotal trend that is reshaping patient outcomes and influencing market dynamics. This shift towards early diagnosis is not only a response to the rising incidence of liver cancer in the country but also a strategic imperative driven by advancements in technology and a growing understanding of the disease.

Liver cancer, primarily driven by factors such as chronic hepatitis infections, alcohol abuse, and non-alcoholic fatty liver disease, presents significant challenges in its management. Traditionally, liver cancer is diagnosed at advanced stages, often when therapeutic options are limited and prognosis is poor. This late-stage diagnosis underscores the critical need for earlier intervention, which can drastically improve patient survival rates and quality of life.

The push towards early detection is catalyzed by advancements in diagnostic technologies and an increasing emphasis on preventive healthcare. Innovations in imaging techniques, such as high-resolution ultrasound, computed tomography (CT) scans, and magnetic resonance imaging (MRI), have enhanced the ability to detect liver abnormalities at earlier stages. These technologies provide detailed insights into liver health, allowing for the identification of precancerous lesions and early-stage tumors that were previously difficult to detect.

In June 2024, Apollo Hospitals, a leading integrated healthcare provider, underscored the critical role of ultrasound imaging in the early detection of fatty liver disease. An analysis of 53,946 health screenings performed over the past year revealed that 33 percent of individuals were diagnosed with fatty liver. Notably, only one-third of these cases exhibited elevated liver enzymes, suggesting that relying solely on blood tests may not be adequate for early diagnosis and intervention. Weight reduction remains a proven strategy for reversing fatty liver at its initial stages, with even a modest 5 to 10

percent reduction in body weight significantly reducing liver fat and inflammation.

In addition to imaging advancements, the development of novel biomarkers is revolutionizing early detection strategies. Biomarkers, including specific proteins, genetic mutations, and other molecular indicators, offer promising avenues for identifying liver cancer before it progresses. For instance, the identification of elevated levels of alpha-fetoprotein (AFP) and other biomarkers in blood tests can signal the presence of liver cancer, prompting further diagnostic evaluation and early intervention.

The focus on early detection is also supported by a growing body of research demonstrating the efficacy of early-stage treatment in improving patient outcomes. Studies have shown that patients diagnosed with liver cancer at an early stage have significantly better survival rates compared to those diagnosed at later stages. This evidence underscores the value of early detection in facilitating timely treatment and potentially curative interventions, such as surgical resection, ablation, or localized therapies.

## Segmental Insights

### Cancer Type Insights

Based on Cancer Type, Hepatocellular Carcinoma have emerged as the fastest growing segment in the India Liver Cancer Therapeutics Market in 2024. Hepatocellular carcinoma (HCC) has emerged as the fastest-growing segment in the Indian liver cancer therapeutics market due to a confluence of factors that have heightened its prevalence and driven the demand for advanced treatment options. As the most common form of liver cancer, HCC has become a focal point of medical research and therapeutic development, reflecting broader trends in the healthcare sector.

Several key drivers have contributed to HCC's rapid growth within the market. Firstly, the increasing incidence of HCC is a major factor. With liver cancer rates on the rise, largely due to a surge in risk factors such as chronic hepatitis B and C infections, non-alcoholic fatty liver disease (NAFLD), and alcohol consumption, there is an escalating need for effective treatment solutions. Recent data highlights that HCC is not only becoming more prevalent but is also being diagnosed at earlier stages, which in turn drives the demand for a broader range of therapeutic options.

The advancement of targeted therapies has significantly impacted the HCC market segment. These therapies are designed to specifically target cancer cells while

minimizing damage to healthy tissues. Drugs such as Sorafenib, Lenvatinib, and Cabozantinib have transformed the treatment landscape for HCC, offering improved efficacy and patient outcomes compared to traditional therapies. The development and approval of these drugs have marked a significant shift in the management of HCC, making this segment particularly dynamic and rapidly evolving.

### Therapy Insights

Based on Therapy, Targeted Therapy have emerged as the dominating segment in the India Liver Cancer Therapeutics Market during the forecast period. Targeted therapy has emerged as a leading segment in the India liver cancer therapeutics market, fundamentally transforming the treatment landscape and positioning itself as a cornerstone in managing this challenging disease. Several key factors contribute to the dominance of targeted therapy in this market, driven by its innovative approach to cancer treatment and its growing adoption among healthcare providers and patients.

One of the primary reasons for the ascendancy of targeted therapy is its precision in addressing the specific genetic and molecular drivers of liver cancer. Unlike conventional treatments that often affect both cancerous and healthy cells, targeted therapies are designed to precisely target the molecular abnormalities that fuel cancer growth. This precision minimizes damage to healthy tissues, leading to fewer side effects and improved patient outcomes. In a country like India, where the burden of liver cancer is substantial and the need for effective, less toxic treatments is critical, targeted therapies offer a compelling advantage.

The rapid advancements in molecular biology and genomics have significantly contributed to the success of targeted therapies. As the understanding of the genetic underpinnings of liver cancer deepens, researchers have been able to develop drugs that specifically target these genetic mutations and pathways. This progress has resulted in more effective treatment options that can be tailored to the individual patient's cancer profile. The ability to customize treatment plans based on genetic information enhances therapeutic efficacy and is a major factor driving the preference for targeted therapies in the Indian market.

The increasing availability of targeted therapies is another crucial factor in their dominance. Over recent years, several targeted agents have gained approval and become accessible in the Indian market, offering new options for patients who previously had limited treatment alternatives. For instance, drugs like Sorafenib, Lenvatinib, and Regorafenib have been approved for the treatment of advanced liver



cancer and have shown significant efficacy in clinical trials. The introduction and accessibility of these therapies contribute to their growing adoption and prominence in the market.

## Regional Insights

Based on Region, West India have emerged as the dominating region in the India Liver Cancer Therapeutics Market in 2024. West India boasts some of the country's most advanced healthcare facilities and institutions. Cities like Mumbai, Pune, and Ahmedabad are home to top-tier hospitals and specialized cancer treatment centers that offer cutting-edge therapies for liver cancer. These facilities are equipped with the latest medical technology and staffed by highly skilled professionals, contributing to the region's reputation as a hub for high-quality cancer care. The presence of renowned institutions such as Tata Memorial Hospital in Mumbai and the Gujarat Cancer Society Hospital in Ahmedabad ensures that patients receive state-of-the-art treatment options, including advanced surgical procedures, targeted therapies, and immunotherapy.

In addition to its healthcare infrastructure, West India's strategic location plays a crucial role in its dominance in the liver cancer therapeutics market. The region's well-developed transportation and logistics networks facilitate the efficient distribution of pharmaceutical products and medical equipment. Mumbai, as a major port city, serves as a crucial entry point for international pharmaceutical companies looking to supply their products to the Indian market. This logistical advantage enables timely availability of both domestic and international liver cancer treatments, further strengthening West India's position in the market.

The pharmaceutical industry in West India is another significant factor contributing to the region's market leadership. The region is a powerhouse of pharmaceutical manufacturing and research, with numerous pharmaceutical companies headquartered or operating within it. West India's pharmaceutical sector is known for its innovation and production capabilities, which include the development and distribution of generic drugs and biosimilars. These factors not only make treatments more accessible and affordable but also foster a competitive market environment that drives the availability of a wide range of liver cancer therapies.

Moreover, West India has witnessed a higher prevalence of liver cancer, partly due to lifestyle factors and regional health trends. The growing incidence of liver cancer has led to increased demand for specialized therapeutic services and products. This demand has spurred both public and private investments in cancer research and

treatment facilities in the region, further solidifying its role as a key player in the liver cancer therapeutics market.

### Key Market Players

Natco Pharma Ltd.

Dr. Reddy's Laboratories Ltd.

Intas Pharmaceuticals Ltd.

Mylan Pharmaceuticals Pvt. Ltd.

Lupin Ltd.

Biocon Ltd.

Hetero Labs Ltd.

### Report Scope

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

#### India Liver Cancer Therapeutics Market, By Cancer Type:

- o Hepatocellular Carcinoma
- o Cholangiocarcinoma
- o Hepatoblastoma
- o Angiosarcoma
- o Liver Metastasis

### India Liver Cancer Therapeutics Market, By Therapy:

- o Targeted Therapy
- o Chemotherapy and Radiation Therapy
- o Immunotherapy
- o Others

### India Liver Cancer Therapeutics Market, By Route of Administration:

- o Oral
- o Intravenous
- o Others

### India Liver Cancer Therapeutics Market, By Distribution Channel:

- o Hospital Pharmacies
- o Retail Pharmacies
- o Online Pharmacies

### India Liver Cancer Therapeutics Market, By Region:

- o North India
- o East India
- o West India
- o South India

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Liver Cancer Therapeutics Market.

## Available Customizations:

India Liver Cancer Therapeutics 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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