

Japan Renal Cancer Drugs Market, By Type (Renal Cell Carcinoma (RCC), Papillary Renal Cell Carcinoma, Chromophobe Renal Cell Carcinoma, Unclassified Renal Cell Carcinoma, Transitional Cell Carcinoma, Wilms Tumor (Nephroblastoma), Renal Sarcoma, Angiomyolipoma, Oncocytoma, Others), By Drug Class (Monoclonal Antibodies, mTOR Inhibitors, Immune Checkpoint Inhibitor, Combined Therapies, Interleukin-2, Alpha-Interferon, Others), By Distribution Channel (Hospital Pharmacy, Online Pharmacy, Retail Pharmacy), By Region, Competition Forecast & Opportunities, 2020-2030F

<https://marketpublishers.com/r/J794A60F8B99EN.html>

Date: September 2024

Pages: 82

Price: US\$ 3,500.00 (Single User License)

ID: J794A60F8B99EN

Abstracts

Japan Renal Cancer Drugs Market was valued at USD 305.12 Million in 2024 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.25% through 2030. The Japanese renal cancer drugs market is witnessing robust growth, fueled by a rising incidence of renal cancer, advancements in drug development, and escalating healthcare investments. The expansion of this market is underpinned by a growing patient population and the introduction of innovative therapies, including targeted and immunotherapies, which enhance treatment options and improve patient outcomes.

Significant research and development efforts are continuously bringing new drugs to market, reflecting the sector's dynamic nature. Innovations in targeted treatments and

immunotherapies are broadening therapeutic options and offering better efficacy. The market's outlook remains positive, with continued advancements in drug development and a focus on personalized medicine shaping its trajectory.

Investment in R&D and supportive healthcare policies are expected to drive further growth. Despite challenges such as high treatment costs and regulatory hurdles, the market is set for ongoing expansion, driven by emerging therapies and evolving treatment approaches.

The Japan renal cancer drugs market is expanding rapidly, supported by increasing incidence rates, ongoing innovations, and substantial healthcare investments. The sector is positioned for continued growth, with future developments likely to be influenced by ongoing research and strategic industry advancements.

Key Market Drivers

Rising Incidence and Prevalence of Renal Cancer

As the incidence of renal cancer rises, the number of patients requiring treatment also grows. This expanding patient base creates a larger market for renal cancer drugs, as pharmaceutical companies and healthcare providers respond to the increased demand for therapeutic solutions. The higher prevalence of renal cancer leads to more diagnoses, which directly translates into a greater need for drug treatments and management options. The growing prevalence of renal cancer spurs increased attention from pharmaceutical companies and researchers. According to the Japanese Cancer Registry, approximately 30,000 new cases of renal cancer were diagnosed in 2019, with the majority being renal cell carcinoma (RCC). The primary treatment for patients with RCC is surgical intervention, which involves either the removal of the entire kidney and surrounding tissues (radical nephrectomy) or just the tumor (partial nephrectomy). A higher number of cases motivates greater investment in research and development to discover and develop new drugs and therapies. Companies are driven to innovate and create more effective treatments to address the specific needs of a larger patient population. This increased focus on drug development leads to a broader range of available therapies and advancements in treatment options, thus expanding the market.

Rising renal cancer rates prompt healthcare systems to enhance their services and infrastructure to manage the growing number of patients. In Japan, this includes the establishment of specialized cancer treatment centers, the adoption of advanced diagnostic tools, and the implementation of comprehensive treatment protocols. As

healthcare providers expand their services to accommodate more patients, there is an increased demand for renal cancer drugs to support these expanded services, driving market growth. The higher prevalence of renal cancer often leads to increased funding from both government and private sectors for research and treatment initiatives. Governments may allocate additional resources to cancer research programs and healthcare funding to support the development and availability of new renal cancer drugs. Similarly, private sector investment in drug development and clinical trials grows in response to the rising number of cases. This funding enhances the capacity for drug innovation and market growth.

The rise in renal cancer cases also highlights the importance of early detection and screening programs. With more cases being identified through advanced screening techniques, there is a greater opportunity to diagnose and treat renal cancer at earlier stages. This early detection leads to increased treatment needs and subsequently drives demand for renal cancer drugs. Enhanced screening programs contribute to a more proactive approach to managing renal cancer, further fueling market growth. As renal cancer becomes more prevalent, both patients and healthcare providers increasingly seek effective treatment options. Patients are more motivated to access the latest and most effective therapies to improve their outcomes, while providers are driven to offer comprehensive treatment plans that include advanced drug options. This heightened demand for effective treatments contributes to the growth of the renal cancer drugs market as new and innovative therapies are developed and introduced. The rising incidence and prevalence of renal cancer significantly drive the growth of the Japan renal cancer drugs market by expanding the patient population, increasing focus on treatment development, prompting enhancements in healthcare services, boosting funding for research, advancing early detection, and heightening demand for effective treatments. These factors collectively contribute to a growing and dynamic market for renal cancer drugs.

Advancements in Drug Development and Innovation

Recent advancements in drug development have led to the introduction of targeted therapies that specifically address the molecular and genetic abnormalities associated with renal cell carcinoma (RCC). These therapies are designed to target and inhibit specific pathways involved in cancer progression, such as vascular endothelial growth factor (VEGF) and mammalian target of rapamycin (mTOR) pathways. The development of these targeted therapies has improved treatment efficacy and reduced side effects compared to traditional chemotherapy, driving increased adoption and growth in the market.

The rise of immunotherapies represents a significant advancement in the treatment of renal cancer. Drugs such as checkpoint inhibitors, which block proteins that prevent the immune system from attacking cancer cells, have shown promising results in clinical trials. The approval and use of these immunotherapies, including PD-1 and PD-L1 inhibitors, have expanded treatment options for patients with advanced or metastatic renal cancer. This innovation has stimulated market growth by offering new, effective treatment modalities and meeting the unmet needs of patients who do not respond to conventional therapies. Combining different therapeutic agents has become a major trend in drug development for renal cancer. Advances in understanding the disease mechanisms and drug interactions have led to the creation of combination therapies that enhance treatment outcomes. For instance, combining targeted therapies with immunotherapies has shown synergistic effects, leading to better response rates and prolonged survival. The development and approval of such combination therapies drive market growth by offering more effective treatment options and catering to a broader range of patient needs. Innovations in drug delivery systems, such as nanotechnology and novel drug formulations, have improved the efficacy and safety of renal cancer drugs. Advanced delivery systems enable targeted delivery of drugs directly to cancer cells while minimizing off-target effects. This precision in drug delivery enhances treatment effectiveness and reduces side effects, making therapies more appealing to both patients and healthcare providers. These advancements contribute to market growth by increasing the adoption of new drugs and improving patient compliance.

Continuous research and clinical trials are a driving force behind drug development in the renal cancer market. Ongoing trials test new compounds, combinations, and treatment regimens, leading to the discovery of novel therapies and improvements in existing treatments. The results from these trials contribute to the approval and commercialization of new drugs, expanding the range of treatment options available to patients. The dynamic research landscape fuels market growth by introducing innovative therapies and driving competition among pharmaceutical companies. Regulatory agencies in Japan, such as the Pharmaceuticals and Medical Devices Agency (PMDA), play a crucial role in accelerating the approval of new renal cancer drugs. The support for fast-track approvals, priority reviews, and orphan drug designations helps bring innovative treatments to market more quickly. This regulatory support facilitates the timely availability of new therapies, driving market growth by ensuring that the latest advancements reach patients efficiently. Advancements in drug development and innovation drive the growth of the Japan renal cancer drugs market through the introduction of targeted therapies and immunotherapies, development of combination therapies, improvements in drug delivery systems, ongoing clinical

research, and regulatory support. These factors collectively enhance treatment options, improve patient outcomes, and stimulate market expansion by meeting the evolving needs of renal cancer patients and healthcare providers.

Increased Investment in Research and Development (R&D)

Significant R&D investment accelerates the discovery of new drugs and innovative treatments for renal cancer. Pharmaceutical companies and research institutions channel funds into exploring novel therapeutic targets, developing new drug compounds, and refining existing treatments. This investment leads to the creation of cutting-edge therapies, such as targeted agents and immunotherapies, which address specific molecular and genetic abnormalities associated with renal cancer. As new and more effective drugs are developed, the market for renal cancer treatments expands, driven by the availability of advanced therapeutic options. Increased R&D funding supports extensive clinical trials and testing of new renal cancer drugs. Robust financial resources enable the conduct of large-scale, multi-phase clinical trials, which are crucial for evaluating the safety and efficacy of new treatments. These trials generate valuable data that can lead to regulatory approvals and market entry for innovative drugs. The successful completion of clinical trials and subsequent approval of new therapies drive market growth by expanding the range of available treatment options and meeting the unmet needs of patients with renal cancer.

In August 2021, Pharmaceutical Co., Ltd. announced that they have received approval for a combination therapy involving ONO's Opdivo® (nivolumab) Intravenous Infusion, a human anti-PD-1 monoclonal antibody, and Takeda's CABOMETYX® (cabozantinib s-malate) tablets, a tyrosine kinase inhibitor licensed from Exelixis, Inc. This combination therapy is approved for the treatment of unresectable or metastatic renal cell carcinoma (RCC) and includes a partial change in the approved items for the manufacturing and marketing approval.

R&D investments facilitate the development of combination therapies, which have become increasingly important in the treatment of renal cancer. Research into drug combinations—such as pairing targeted therapies with immunotherapies—has shown promise in enhancing treatment efficacy and overcoming resistance. Investment in this area enables the exploration of synergistic effects and optimization of combination regimens, leading to more effective treatment options. The availability of combination therapies drives market growth by providing patients with advanced and personalized treatment regimens. Precision medicine, which involves tailoring treatments based on individual genetic profiles, is a focus of significant R&D investment. Research into

genetic biomarkers and personalized treatment approaches enhances the ability to develop drugs that target specific cancer subtypes and patient populations. Increased investment in this area leads to the creation of precision therapies that offer improved efficacy and reduced side effects. The integration of precision medicine into renal cancer treatment drives market growth by expanding the applicability and effectiveness of new drugs. Higher R&D investment fosters collaborations and partnerships between pharmaceutical companies, academic institutions, and biotechnology firms. These collaborations enhance the efficiency and scope of research efforts, enabling the pooling of expertise, resources, and data. Strategic partnerships often lead to accelerated drug development processes and the sharing of knowledge that can drive innovation. The collaborative environment created by increased R&D funding contributes to the rapid introduction of new renal cancer drugs and drives market growth.

Investment in R&D also supports efforts to secure regulatory approvals and facilitate market access for new renal cancer drugs. Companies invest in preclinical studies, clinical trials, and regulatory submissions to meet the requirements of health authorities such as the Pharmaceuticals and Medical Devices Agency (PMDA) in Japan. This support ensures that new therapies can be approved and introduced to the market more efficiently. Regulatory approvals and successful market access drive growth by expanding the availability of new treatments and enhancing market competition. Increased investment in research and development drives the growth of the Japan renal cancer drugs market by accelerating drug discovery, enhancing clinical trials, facilitating the development of combination and precision therapies, strengthening collaborations, and supporting regulatory approvals. These factors collectively contribute to the advancement of renal cancer treatments, meeting patient needs and expanding the market for innovative drugs.

Key Market Challenges

Integration with Existing Systems

The primary challenges facing the medical scheduling software market is the difficulty of integrating new software solutions with existing healthcare systems. Many healthcare organizations use legacy systems that are not compatible with modern scheduling software, leading to issues with data synchronization and workflow continuity. Integration challenges can result in additional costs and complexity for healthcare providers, as they may need to invest in system upgrades or custom interfaces. The lack of interoperability between different software solutions and electronic health

records (EHR) systems can hinder the seamless adoption and functionality of new scheduling tools, affecting their market growth.

Data Security and Privacy Concerns

Data security and privacy are critical concerns in the healthcare industry, and these issues also affect the medical scheduling software market. The handling of sensitive patient information requires stringent security measures to prevent breaches and comply with regulations such as the Health Insurance Portability and Accountability Act (HIPAA) in the United States or the General Data Protection Regulation (GDPR) in Europe. Ensuring that medical scheduling software adheres to these regulations and provides robust data protection features can be complex and costly. Healthcare providers may be hesitant to adopt new scheduling solutions if they are unsure about the software's ability to secure patient data effectively. Consequently, concerns over data security and privacy can limit the adoption of new scheduling technologies and impede market growth.

High Costs of Implementation and Maintenance

The cost associated with implementing and maintaining medical scheduling software poses a significant challenge for healthcare organizations, particularly smaller practices and facilities with limited budgets. The initial investment for purchasing and installing scheduling software can be substantial, and ongoing costs for software updates, technical support, and training can add to the financial burden. Additionally, healthcare organizations must allocate resources for system customization and integration, further increasing the overall cost of ownership. These high costs can be a deterrent for smaller or budget-constrained organizations, limiting the broader adoption of scheduling software and restricting market growth.

Key Market Trends

Advancements in Targeted Therapies and Immunotherapies

The development of targeted therapies and immunotherapies represents a significant trend in the renal cancer drugs market. Targeted therapies aim to attack cancer cells with precision, focusing on specific molecular targets associated with renal cell carcinoma (RCC). These treatments offer improved efficacy and reduced side effects compared to conventional therapies. Similarly, immunotherapies, including checkpoint inhibitors and CAR-T cell therapies, are revolutionizing the treatment landscape by

harnessing the body's immune system to fight cancer more effectively. The continuous advancement in these therapies is driving market growth as they provide new hope for patients with previously difficult-to-treat or advanced stages of renal cancer.

Integration of Precision Medicine

Precision medicine, which tailors treatment based on individual genetic profiles and biomarkers, is becoming increasingly integral to the management of renal cancer. The integration of genomic and molecular diagnostics allows for more personalized treatment plans, improving therapeutic outcomes and minimizing adverse effects. In Japan, where there is a strong emphasis on cutting-edge medical technology and research, the adoption of precision medicine is expected to grow rapidly. This trend is driven by advancements in genomic sequencing technologies and the development of companion diagnostics, which enhance the ability to match patients with the most effective therapies. As precision medicine becomes more prevalent, it is expected to drive demand for new and specialized renal cancer drugs.

Rising Focus on Early Detection and Screening Programs

Enhanced focus on early detection and screening is another crucial trend influencing the renal cancer drugs market. Early diagnosis of renal cancer significantly improves treatment outcomes and patient survival rates. In Japan, where there is a growing emphasis on preventive healthcare and early intervention, increased investment in screening programs and diagnostic technologies is driving market growth. The implementation of advanced imaging techniques, such as high-resolution MRI and CT scans, along with the development of novel biomarkers for early detection, is expected to lead to earlier identification of renal cancer cases. This trend not only expands the patient pool eligible for treatment but also stimulates the development and uptake of new renal cancer drugs tailored for early-stage disease.

Segmental Insights

Type Insights

Based on the category of type, the Renal Cell Carcinoma segment emerged as the dominant in the market for Japan Renal Cancer Drugs in 2024. Renal Cell Carcinoma, the most common form of kidney cancer in adults, represents a substantial portion of the renal cancer drug market due to its prevalence and the significant therapeutic needs associated with it. RCC encompasses various subtypes, including clear cell RCC,

papillary RCC, and chromophobe RCC. The high incidence rate of RCC compared to other renal malignancies leads to a greater demand for targeted therapies and advanced treatments tailored to this condition.

RCC accounts for a large majority of kidney cancer cases in Japan. The high incidence of RCC, relative to other types of renal cancers, creates a substantial patient population requiring treatment. This large patient base drives the demand for both existing therapies and new drug innovations. Significant investment in research and development is directed towards RCC due to its complexity and the ongoing need for more effective treatments. Pharmaceutical companies and biotech firms focus extensively on developing targeted therapies, immunotherapies, and combination treatments specifically for RCC. This focus reflects the priority given to RCC in drug development pipelines and clinical trials. The treatment landscape for RCC has advanced considerably in recent years with the introduction of novel targeted therapies and immunotherapies. These advancements have significantly improved patient outcomes and increased the market size for RCC-specific drugs. The introduction of new therapies continually shifts market dynamics, further solidifying RCC's dominant position.

The robust healthcare infrastructure in Japan supports the treatment of RCC with specialized centers for oncology and nephrology, advanced diagnostic tools, and cutting-edge therapeutic options. This infrastructure ensures that RCC patients have access to the latest treatments, thereby driving market growth for RCC-focused drugs. Japanese healthcare policies and insurance systems provide support for the coverage of RCC treatments, which enhances accessibility and encourages market growth. The reimbursement framework facilitates the adoption of innovative therapies, thus benefiting the RCC drug segment. These factors collectively contribute to the growth of this segment.

Regional Insights

Kanto emerged as the dominant in the Japan Renal Cancer Drugs market in 2024, holding the largest market share in terms of value. Kanto Region, which includes major metropolitan areas like Tokyo and Yokohama, boasts a highly developed healthcare infrastructure. This region is home to numerous leading hospitals, research institutions, and specialized oncology centers. These facilities are pivotal in the advancement of renal cancer treatments, facilitating clinical trials, and enabling access to cutting-edge therapies. The presence of such institutions not only supports innovation but also drives the adoption of new renal cancer drugs. The Kanto Region benefits from a high

concentration of pharmaceutical companies and biotechnology firms. Many global and domestic players in the renal cancer drugs market have established their headquarters or major operational centers in this region. This clustering effect fosters a competitive environment conducive to rapid development and commercialization of new drugs. The synergy between pharmaceutical companies and healthcare providers in the Kanto Region accelerates the availability of advanced treatments for renal cancer patients.

Also, the Kanto Region's substantial population, coupled with a high incidence of renal cancer, creates a significant market demand. The dense urban population provides a large patient base, which is crucial for the commercial success of renal cancer drugs. The high prevalence of renal cancer in this region drives both the need for novel therapies and the funding for research and development efforts aimed at addressing this disease. The Kanto Region benefits from robust healthcare funding and insurance systems. This financial support ensures that patients have access to the latest treatments and that pharmaceutical companies can invest in research and development with a reasonable expectation of return on investment. The well-established healthcare policies and reimbursement frameworks in the region further support the market growth by facilitating the introduction and uptake of new renal cancer drugs.

Key Market Players

Pfizer Inc

AstraZeneca

Bristol-Myers Squibb Company

Dr. Reddy's Laboratories Ltd

Endo, Inc.

Teva Takeda Pharma Ltd

Viartis Inc

Novartis AG

Cipla Limited

F. Hoffmann-La Roche Ltd

Report Scope:

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

Japan Renal Cancer Drugs Market, By Type:

Renal Cell Carcinoma (RCC)

Papillary Renal Cell Carcinoma

Chromophobe Renal Cell Carcinoma

Unclassified Renal Cell Carcinoma

Transitional Cell Carcinoma

Wilms Tumor (Nephroblastoma)

Renal Sarcoma

Angiomyolipoma

Oncocytoma

Others

Japan Renal Cancer Drugs Market, By Application:

Monoclonal Antibodies

mTOR Inhibitors

Immune Checkpoint Inhibitor

Combined Therapies

Interleukin-2

Alpha-Interferon

Others

Japan Renal Cancer Drugs Market, By Distribution Channel:

Hospital Pharmacy

Online Pharmacy

Retail Pharmacy

Japan Renal Cancer Drugs Market, By Region:

Hokkaido

Tohoku

Kanto

Chubu

Kansai

Chugoku

Shikoku

Kyushu

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Japan Renal Cancer Drugs Market.

Japan Renal Cancer Drugs Market, By Type (Renal Cell Carcinoma (RCC), Papillary Renal Cell Carcinoma, Chromoph...

Available Customizations:

Japan Renal Cancer Drugs 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).

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