

Japan Sarcoma Drugs Market, By Treatment Type (Chemotherapy, Targeted Therapy, Others), By Distribution Channel (Hospital pharmacy, Retail pharmacy, Online Pharmacy), By Region, Competition Forecast & Opportunities, 2020-2030F

<https://marketpublishers.com/r/J0C56C0B8988EN.html>

Date: September 2024

Pages: 82

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

ID: J0C56C0B8988EN

Abstracts

Japan Sarcoma Drugs Market was valued at USD 32.25 Million in 2024 and is anticipated to project impressive growth in the forecast period with a CAGR of 7.85% through 2030. The Japan Sarcoma Drugs Market is a niche sector within the broader oncology market, focusing on the treatment of sarcomas rare cancers originating in connective tissues. Despite its specialized nature, the market is experiencing steady growth, driven by several key factors.

The market's size is shaped by the increasing prevalence of sarcoma cases, advancements in treatment options, and rising investments in research and development. The sector is dynamic and evolving, primarily due to breakthroughs in molecular and genetic research, the expansion of immunotherapy and novel therapeutic approaches, and a growing incidence of sarcoma cases.

The market benefits from a supportive regulatory environment and is characterized by a competitive landscape with major pharmaceutical and biotechnology companies investing heavily in innovation. While challenges such as high drug development costs and regulatory complexities exist, significant growth opportunities are present. These opportunities include expansion into emerging markets, leveraging technological advancements, and pursuing strategic collaborations.

Key Market Drivers

Advancements in Molecular and Genetic Research

Advancements in molecular and genetic research are pivotal in driving the growth of the Japan Sarcoma Drugs Market. These advancements have fundamentally transformed the approach to sarcoma treatment by enabling the development of more targeted, effective, and personalized therapies. Molecular and genetic research has uncovered specific genetic mutations and molecular pathways involved in sarcoma development. By identifying these genetic aberrations, researchers can develop targeted therapies designed to precisely address these anomalies. Targeted therapies, such as tyrosine kinase inhibitors and monoclonal antibodies, are tailored to interfere with the specific molecular drivers of sarcoma. This precision leads to higher efficacy and fewer off-target effects compared to traditional treatments, such as chemotherapy. The development of targeted therapies expands the range of treatment options available for sarcoma patients. This diversification of therapies meets the varied needs of patients with different sarcoma subtypes, driving market demand. The introduction of effective targeted therapies enhances patient outcomes and drives market growth by increasing treatment uptake and encouraging investment in new drug development.

Personalized medicine utilizes genetic and molecular information from individual patients to tailor treatments specifically to their unique genetic profiles and tumor characteristics. This approach relies on advancements in genomics and molecular diagnostics. Personalized medicine ensures that treatments are matched to the individual's genetic makeup, improving the precision of interventions. This reduces the likelihood of ineffective treatments and adverse reactions, leading to better patient outcomes and higher demand for personalized therapies. The rise of personalized medicine has led to the development of companion diagnostics, which are tests used to identify patients who are most likely to benefit from a specific therapy. This drives the growth of both diagnostic and therapeutic segments within the market. The promise of personalized medicine attracts substantial investment from pharmaceutical companies, biotechnology firms, and research institutions. This investment supports the development of new, innovative sarcoma drugs and fuels market expansion. Genomic profiling and molecular diagnostics have advanced significantly, enabling comprehensive analysis of sarcoma tumors to identify specific genetic mutations and molecular features. These technologies provide critical insights into the biological mechanisms of sarcoma. Detailed genomic and molecular profiling informs the development of new sarcoma drugs by identifying potential targets for therapy. This leads to the creation of more effective and targeted treatment options, driving market growth. Advanced molecular diagnostics enhance the accuracy of sarcoma diagnosis and classification. Accurate diagnosis enables timely and appropriate treatment,

increasing the demand for effective sarcoma therapies. The availability of advanced genomic and molecular tools accelerates research and development efforts. This results in a faster introduction of new drugs to the market, contributing to market growth.

Research into the molecular and genetic underpinnings of different sarcoma subtypes has led to a better understanding of their unique characteristics and behavior. This knowledge facilitates the development of targeted therapies for specific sarcoma subtypes. Understanding the distinct molecular profiles of various sarcoma subtypes enables the development of targeted drugs that address the specific needs of each subtype. This drives demand for new treatments and enhances market growth. The ability to tailor treatments to specific sarcoma subtypes improves patient outcomes and increases the effectiveness of therapies. This personalized approach contributes to higher adoption rates of new drugs. The development of subtype-specific therapies differentiates the market and stimulates competition among pharmaceutical companies, leading to innovation and growth. Advancements in molecular and genetic research drive the growth of the Japan Sarcoma Drugs Market by enabling the development of targeted therapies, advancing personalized medicine, improving genomic profiling and molecular diagnostics, and increasing understanding of sarcoma subtypes. These advancements lead to more effective, precise, and personalized treatment options, enhancing patient outcomes and fueling market expansion. The continuous evolution of research in these areas ensures a dynamic and rapidly growing market for sarcoma drugs.

Growing Incidence of Sarcoma Cases

The growing incidence of sarcoma cases is a significant driver of the Japan Sarcoma Drugs Market. Sarcomas are rare and diverse cancers that affect connective tissues, including bones, muscles, and fat. The increase in sarcoma cases has multifaceted implications for the market, influencing both the demand for treatments and the overall market dynamics. In 2021, Japan reported 27 cases of Ewing sarcoma among children, a notable increase compared to the period from 2012 to 2014, during which no cases were documented. In the same year, brain tumors were the most prevalent cancer type among children in Japan, with a total of 376 cases reported. As the number of sarcoma cases rises, there is a corresponding increase in the demand for effective therapeutic options. This demand is driven by the need to address a larger patient population with diverse sarcoma subtypes. Pharmaceutical companies are incentivized to expand their portfolios to include treatments for various types of sarcomas. This expansion includes the development and introduction of new drugs tailored to specific sarcoma subtypes, driving market growth. With more patients seeking treatment, the market experiences

higher sales volumes for sarcoma drugs. This increased demand stimulates investment in drug development and contributes to market expansion. The growing patient population encourages the development of innovative therapies, including targeted treatments and immunotherapies, to address unmet medical needs in sarcoma treatment. The rising incidence of sarcoma cases spurs increased focus on research and development efforts aimed at understanding and treating these cancers more effectively. The growing number of sarcoma cases attracts investment from pharmaceutical companies, biotechnology firms, and research institutions. This investment fuels the development of new drugs and therapies, enhancing market growth. Research efforts are accelerated to address the increasing prevalence of sarcomas. This acceleration leads to faster development and commercialization of new treatments, contributing to market expansion. Increased incidence of sarcoma cases provides a larger patient pool for clinical trials, facilitating the testing of new drugs and therapies. This larger pool enhances the likelihood of successful trials and market approval.

The rising number of sarcoma cases has led to enhanced awareness and screening initiatives aimed at early detection and diagnosis. Improved awareness and screening programs lead to earlier detection of sarcoma cases. Early diagnosis enables timely intervention and increases the demand for effective treatments, driving market growth. Awareness campaigns and educational initiatives for both the public and healthcare providers increase the recognition of sarcoma symptoms and the importance of seeking treatment. This heightened awareness contributes to higher diagnosis rates and treatment uptake. Enhanced screening programs result in more patients being identified and enrolled in treatment programs and clinical trials. This increased patient enrollment supports market growth by creating a larger base of potential drug users.

The growing incidence of sarcoma cases prompts adaptations in the healthcare system, including resource allocation and infrastructure development to accommodate the increasing number of patients. Healthcare systems may expand or enhance facilities and resources dedicated to the treatment of sarcomas. This expansion supports the delivery of advanced therapies and drives market growth. Rising sarcoma incidence leads to increased healthcare spending on sarcoma treatments, including drugs and supportive care. This spending drives market growth by creating greater financial resources for drug procurement and innovation. The growing burden of sarcoma cases may lead to policy changes and increased funding for research and treatment programs. Supportive policies and funding contribute to the development and availability of new drugs. The growing incidence of sarcoma cases drives the Japan Sarcoma Drugs Market by increasing demand for therapeutic options, focusing R&D efforts on

innovative treatments, enhancing awareness and screening initiatives, and prompting adaptations in the healthcare system. These factors collectively contribute to the expansion of the market by fostering a larger patient base, accelerating drug development, and increasing investment in sarcoma research and treatment. As the number of sarcoma cases continues to rise, the market for sarcoma drugs is expected to grow in response to the evolving needs of patients and healthcare providers.

Expansion of Immunotherapy and Novel Therapeutic Approaches

The expansion of immunotherapy and novel therapeutic approaches is a key driver of growth in the Japan Sarcoma Drugs Market. These advancements are reshaping the treatment landscape for sarcomas, offering new hope for patients and presenting significant opportunities for pharmaceutical and biotechnology companies. Immunotherapy harnesses the body's immune system to target and destroy cancer cells. Recent advancements include checkpoint inhibitors, CAR-T cell therapy, and cancer vaccines, which have shown promise in treating various cancers, including sarcomas. Immunotherapies, such as checkpoint inhibitors (e.g., PD-1/PD-L1 inhibitors) and CAR-T cell therapy, have demonstrated the ability to target sarcoma cells more effectively than traditional treatments. These therapies can lead to significant improvements in patient outcomes, driving higher demand for these innovative drugs. The introduction of new immunotherapies diversifies the treatment options available for sarcoma patients. This increased variety caters to different sarcoma subtypes and patient profiles, contributing to the market's growth. Success in immunotherapy clinical trials encourages further research and development. Pharmaceutical companies are investing in the development of new immunotherapy agents, which drives innovation and expansion in the sarcoma drugs market.

Novel therapeutic approaches, including targeted therapies and advanced drug delivery systems, are complementing traditional treatments. These approaches are designed to address specific molecular targets or enhance drug delivery to sarcoma cells. Innovations in targeted therapies involve the development of drugs that precisely interact with molecular targets associated with sarcoma. For example, tyrosine kinase inhibitors and mTOR inhibitors are designed to disrupt specific pathways involved in sarcoma growth, leading to more effective treatment options. Novel drug delivery systems, such as nanotechnology-based carriers and localized delivery methods, enhance the efficacy and safety of sarcoma treatments. These systems improve drug penetration and minimize side effects, driving market demand for advanced therapies. The success of novel therapeutic approaches stimulates ongoing research and development efforts. This continuous innovation leads to the introduction of new drugs

and treatment modalities, fueling market growth. The success of clinical trials evaluating immunotherapies and novel therapies for sarcomas accelerates their approval and market entry. Positive trial outcomes validate the efficacy and safety of these treatments, leading to regulatory approvals and increased availability. Successful clinical trials result in faster regulatory approvals from agencies such as the Pharmaceuticals and Medical Devices Agency (PMDA) in Japan. These approvals facilitate the market entry of new drugs, contributing to the growth of the sarcoma drugs market. Once approved, new therapies can quickly penetrate the market, expanding treatment options and driving sales. The availability of approved immunotherapies and novel drugs boosts patient access and market expansion. Positive clinical trial results and subsequent approvals enhance investor confidence in the sarcoma drugs market. Increased investment supports further research, development, and commercialization of innovative therapies.

The unique characteristics of sarcomas, including their rarity and aggressiveness, have led to a focused approach in developing treatments that specifically address these challenges. The expansion of immunotherapy and novel approaches aligns with the need for effective treatments for these complex cancers. The focus on rare and aggressive cancers like sarcomas drives the development of specialized drugs and therapies. This targeted approach meets the specific needs of sarcoma patients and stimulates market growth. Many novel therapies for sarcomas receive orphan drug designations, which provide regulatory and financial incentives. These designations support the development and commercialization of treatments for rare cancers, contributing to market expansion. The emphasis on addressing challenging cancer types attracts funding from government bodies, research institutions, and private investors. This funding supports the development of new therapies and drives market growth. The expansion of immunotherapy and novel therapeutic approaches drives the growth of the Japan Sarcoma Drugs Market by improving treatment efficacy, diversifying therapeutic options, and accelerating drug development and approvals. These advancements offer new hope for sarcoma patients and create significant opportunities for market expansion. The continuous innovation in immunotherapies and novel therapies ensures a dynamic and rapidly evolving market, addressing the unmet needs of patients and contributing to overall market growth.

Key Market Challenges

High Cost of Drug Development and Treatment

The development of sarcoma drugs, particularly targeted therapies and

immunotherapies, involves substantial costs. This includes the expense of research and development (R&D), clinical trials, and regulatory approvals. High costs are a significant barrier in the sarcoma drugs market.

The high cost of developing and manufacturing new sarcoma drugs often translates into high prices for patients. This can limit access to innovative treatments, particularly for those without sufficient insurance coverage or financial resources. The high cost of treatment imposes a financial burden on healthcare systems and patients. This can lead to delayed or reduced treatment options, affecting patient outcomes and overall market growth. High R&D costs may deter smaller pharmaceutical companies and research institutions from pursuing new drug development. This can slow the introduction of novel therapies and limit market innovation.

Regulatory and Approval Challenges

Navigating the regulatory landscape for sarcoma drugs in Japan can be complex and time-consuming. The approval process involves stringent requirements, lengthy review periods, and extensive clinical data.

The lengthy and rigorous approval process can delay the introduction of new sarcoma drugs to the market. This can hinder the availability of cutting-edge treatments and affect market growth. Meeting regulatory requirements involves significant costs, including conducting extensive clinical trials and adhering to strict guidelines. These costs can be a barrier for companies, particularly those with limited resources. The uncertainty associated with regulatory approvals can impact investment decisions and market strategies. Companies may be hesitant to invest in the development of new sarcoma drugs if there is a high risk of non-approval.

Limited Awareness and Diagnosis Challenges

Sarcomas are relatively rare and diverse cancers, which can lead to challenges in awareness, early diagnosis, and treatment. The rarity and complexity of sarcomas contribute to difficulties in market growth.

Sarcomas often present with non-specific symptoms, leading to delays in diagnosis. Late-stage diagnosis can limit treatment options and affect patient outcomes, reducing the demand for certain drugs. Limited awareness among healthcare professionals and the general public about sarcomas can impact early detection and treatment. This lack of awareness may result in fewer patients seeking treatment, affecting drug market

potential. The heterogeneity of sarcomas, with various subtypes and genetic variations, complicates drug development and treatment. Developing effective therapies that address the wide range of sarcoma types and subtypes is challenging and resource-intensive.

Key Market Trends

Advancements in Precision Medicine and Genomics

The integration of precision medicine and genomics is revolutionizing the approach to treating sarcomas. Precision medicine involves tailoring treatments based on individual genetic, molecular, and environmental factors, while genomics focuses on understanding the genetic alterations that drive cancer.

Advances in genomic research have led to the development of targeted therapies that specifically address the genetic mutations and molecular pathways involved in sarcoma. These therapies offer higher efficacy and fewer side effects compared to traditional treatments. Precision medicine enables the creation of personalized treatment plans, improving treatment outcomes and patient satisfaction. This approach increases the demand for drugs that cater to specific genetic profiles and molecular targets. Pharmaceutical companies are investing heavily in genomics and precision medicine to develop new sarcoma therapies. This trend drives innovation and introduces novel drugs to the market, contributing to its growth.

Expansion of Immunotherapy Options

Immunotherapy, which harnesses the body's immune system to fight cancer, is gaining traction as a promising treatment for sarcomas. This approach includes various modalities such as checkpoint inhibitors, CAR-T cell therapy, and cancer vaccines.

Immunotherapies have shown potential in improving treatment outcomes for sarcoma patients, especially those with aggressive or resistant forms of the disease. The effectiveness of these therapies drives their adoption and market growth. A significant number of clinical trials are underway to evaluate the efficacy of immunotherapies for different types of sarcomas. Positive trial results and subsequent approvals will expand the market for these drugs. Growing awareness of immunotherapy's potential and increasing investment from both public and private sectors boost the development and commercialization of new immunotherapy options for sarcoma.

Emergence of Novel Drug Delivery Systems

Innovations in drug delivery systems are enhancing the effectiveness and safety of sarcoma treatments. These novel systems include advanced formulations, nanotechnology-based delivery, and targeted delivery methods.

Novel drug delivery systems enable more precise delivery of drugs to sarcoma cells, enhancing their efficacy and reducing off-target effects. This improvement in drug performance drives demand for advanced delivery technologies. Advanced delivery systems can minimize systemic toxicity and side effects, making treatments more tolerable for patients. This reduction in adverse effects increases patient adherence and treatment uptake. The development and adoption of new drug delivery technologies create new market opportunities and drive competition among pharmaceutical companies to introduce innovative solutions. This trend contributes to the overall growth of the sarcoma drugs market.

Segmental Insights

Treatment Type Insights

Based on the category of Treatment Type, the Targeted Therapy segment emerged as the dominant in the market for Japan Sarcoma Drugs in 2024. Targeted therapies are designed to specifically target cancer cells while sparing healthy cells, resulting in fewer side effects compared to traditional chemotherapy. This precision makes targeted therapies highly effective in treating sarcomas, which are a diverse group of cancers originating from different tissues. The ability of targeted therapies to address the specific molecular and genetic alterations in sarcoma cells enhances their efficacy, leading to better patient outcomes. The continuous advancements in molecular biology and genetics have significantly contributed to the growth of the targeted therapy segment. In Japan, robust research initiatives and investments in understanding the genetic and molecular basis of sarcomas have led to the development of advanced targeted therapies. These therapies are tailored to interfere with specific pathways and mechanisms that drive sarcoma growth, making them more effective and personalized.

The Japanese government and regulatory bodies provide strong support for the approval and adoption of targeted therapies. Policies that fast-track the approval process for innovative cancer treatments, especially for rare cancers like sarcoma, have facilitated the quicker introduction of new targeted therapies to the market. This regulatory environment encourages pharmaceutical companies to focus on developing

targeted treatments, reinforcing their dominance in the market. Patients and healthcare providers increasingly prefer targeted therapies due to their better safety profile and the potential for improved quality of life. Unlike chemotherapy, which often comes with severe side effects such as nausea, fatigue, and hair loss, targeted therapies tend to have milder side effects, making them more tolerable for patients. This preference drives higher adoption rates of targeted therapies among sarcoma patients.

Clinical trials and real-world studies have demonstrated high success rates and positive clinical outcomes with targeted therapies in treating various types of sarcomas. The effectiveness of these therapies in shrinking tumors, extending progression-free survival, and improving overall survival rates contributes to their dominant position in the market. The compelling evidence of their success drives both physician recommendations and patient choice. The pharmaceutical industry in Japan is highly competitive and innovation-driven, with many companies investing heavily in the development of new targeted therapies. The competition among pharmaceutical companies to produce the most effective and novel targeted treatments leads to a continuous pipeline of new drugs entering the market. This innovation cycle ensures that targeted therapies remain at the forefront of sarcoma treatment options. These factors collectively contribute to the growth of this segment.

Regional Insights

Kanto emerged as the dominant in the Japan Sarcoma Drugs market in 2024, holding the largest market share in terms of value. The Kanto Region, encompassing Tokyo, Yokohama, and other major cities, hosts a dense network of world-renowned hospitals, medical universities, and research institutions. These facilities are at the forefront of medical research and clinical trials, particularly in oncology and rare diseases like sarcoma. The presence of these institutions fosters a robust environment for innovation, enabling rapid advancements in sarcoma drug development and access to cutting-edge treatments. Kanto's advanced healthcare infrastructure ensures the efficient delivery of medical services, including specialized care for sarcoma patients. The region's hospitals are equipped with state-of-the-art technology and staffed by highly skilled medical professionals, facilitating early diagnosis and effective treatment of sarcoma. This infrastructure supports a high standard of patient care, contributing to the market's growth by attracting patients seeking top-tier medical services.

Many leading pharmaceutical companies have established their headquarters or significant operations in the Kanto Region. This strategic presence enables these companies to collaborate closely with local research institutions and healthcare

providers, accelerating the development and commercialization of sarcoma drugs. Additionally, the proximity to regulatory bodies in Tokyo streamlines the approval process for new treatments, enhancing market access and growth. Kanto's prominence in the sarcoma drugs market is bolstered by substantial investment in research and development (R&D). Both public and private sectors in the region invest heavily in medical research, supporting the discovery of novel therapies and improving existing treatments for sarcoma. This strong focus on R&D fosters a continuous pipeline of innovative drugs, driving market expansion.

As one of the most populous regions in Japan, Kanto has a higher incidence of sarcoma cases, creating a significant demand for effective treatments. The region's large patient population provides a substantial market for sarcoma drugs, encouraging pharmaceutical companies to focus their efforts on meeting this demand. Moreover, the high prevalence of sarcoma cases supports extensive clinical trials, further advancing the development of new therapies. The Japanese government provides strong support for healthcare advancements, particularly in the treatment of rare and serious conditions like sarcoma. Policies promoting research, fast-track approvals for orphan drugs, and financial incentives for pharmaceutical companies enhance the region's attractiveness for sarcoma drug development. Kanto benefits from these favorable policies, reinforcing its leadership in the market.

Key Market Players

Novartis AG

Pfizer Inc.

Eisai Co., Ltd

Bayer AG

F. Hoffmann-La Roche Ltd.

GSK Plc

Teva Takeda Pharma Ltd

Bristol-Myers Squibb Company

Shenzhen Chipscreen Biosciences Co., Ltd.

Monopar Therapeutics Inc

Report Scope:

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

Japan Sarcoma Drugs Market, By Treatment Type:

Chemotherapy

Targeted Therapy

Others

Japan Sarcoma Drugs Market, By Distribution Channel:

Hospital pharmacy

Retail pharmacy

Online Pharmacy

Japan Sarcoma 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 Sarcoma Drugs Market.

Available Customizations:

Japan Sarcoma 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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