

Oncolytic Virus Therapy Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Virus Type (Adenovirus, Herpes Simplex Virus (HSV), Measles Virus, Reovirus, Vaccinia Virus, Vesicular Stomatitis Virus (VSV), Others), By Application (Solid Tumors, Hematological Malignancies), by End User (Hospitals, Cancer Research Institutes, Biopharmaceutical Companies), by region, and Competition

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Abstracts

Global Oncolytic Virus Therapy Market was valued at USD 15.38 billion in 2022 and is anticipated to witness an impressive growth in the forecast period with a CAGR of 23.10% through 2028. Oncolytic viruses are a class of viruses that can infect and selectively replicate in cancer cells, leading to their destruction or causing them to undergo programmed cell death (apoptosis). These viruses are engineered or naturally occurring to exhibit a tumor-selective preference, meaning they have an innate ability to target and replicate within cancerous cells while sparing normal, healthy cells. Oncolytic viruses have gained attention and significance in the field of cancer therapy due to their potential as a targeted and innovative treatment approach. Oncolytic viruses have an inherent preference for infecting and replicating within cancer cells. This selectivity is often based on differences in cellular factors and molecular characteristics between cancer cells and healthy cells. Once inside cancer cells, oncolytic viruses replicate and multiply. This replication eventually leads to the lysis (bursting) of the cancer cell, releasing newly formed viral particles that can infect adjacent cancer cells. This process continues, effectively spreading the infection throughout the tumor.

Ongoing research has deepened our understanding of oncolytic viruses, leading to the development of more potent and targeted therapies. This scientific progress drives innovation in the field. Positive outcomes in clinical trials and real-world applications of oncolytic virus therapies for various cancer types have boosted confidence in their efficacy. Demonstrating survival benefits and improved outcomes for patients has been a key driver. The concept of combining oncolytic virus therapy with other treatment modalities, such as immunotherapies or targeted therapies, has gained traction. This combination approach enhances the potential for better cancer treatment outcomes. Increased awareness and education about oncolytic virus therapy among healthcare professionals, patients, and the public have contributed to its acceptance and adoption.

Key Market Drivers

Advancements in Research

Researchers have made significant progress in genetically engineering oncolytic viruses to enhance their tumor-selectivity and therapeutic effectiveness. This includes modifying the virus's ability to replicate in cancer cells while sparing healthy cells. Combining oncolytic virus therapy with other cancer treatments, such as immunotherapies (e.g., immune checkpoint inhibitors) and targeted therapies, has shown promise in improving overall treatment outcomes. Researchers are exploring the best combinations and treatment sequences. Research efforts have led to the development of safer oncolytic viruses with reduced potential for off-target effects. Safety is a critical consideration in regulatory approval and clinical use. The human immune system can neutralize oncolytic viruses. Researchers are developing strategies to evade the host immune response or to enhance the immunostimulatory effects of oncolytic viruses, making them more effective in combating cancer.

Identifying biomarkers that can predict a patient's response to oncolytic virus therapy is a key area of research. This enables a more personalized approach to treatment and ensures that therapy is administered to those who are most likely to benefit. Research has led to innovations in the delivery of oncolytic viruses to tumor sites. This includes the use of nanoparticles, viral vectors, and specialized delivery vehicles to enhance the efficiency of virus delivery. While the Herpes Simplex Virus (HSV) has been prominent, research has expanded to include other virus platforms, such as adenoviruses, reoviruses, and poxviruses. Exploring a variety of virus platforms broadens the scope of oncolytic virus therapy. Ongoing clinical trials have explored the use of oncolytic virus therapy in various cancer types and at different stages of disease. These trials provide

valuable data on safety and efficacy, helping to refine treatment protocols.

Researchers are developing methods to stratify patients based on their molecular and genetic profiles, enabling the tailoring of oncolytic virus therapy to individual patients. This personalized approach is considered a significant advancement. Some tumors develop resistance to oncolytic virus therapy over time. Research is ongoing to understand the underlying resistance mechanisms and to develop strategies to overcome them. Advances in the large-scale production and manufacturing of oncolytic viruses have made these therapies more accessible for clinical use. Research is uncovering new applications for oncolytic virus therapy, such as its use in combination with surgery or radiation therapy, as well as its potential in the treatment of rare cancers. This factor will help in the development of the Global Oncolytic Virus Therapy Market.

Increasing Awareness and Education

As patients become more informed about oncolytic virus therapy, they can actively engage in discussions with their healthcare providers and explore treatment options that best suit their needs. This empowerment can lead to increased demand for oncolytic virus therapy. Education and awareness efforts target healthcare professionals, ensuring that they are well-informed about oncolytic virus therapy. When doctors are aware of and understand the therapy, they are more likely to recommend it to eligible patients, thereby driving demand. Increased awareness of oncolytic virus therapy often leads to more patients participating in clinical trials. This not only advances research but also allows patients early access to promising therapies, driving demand in the experimental and post-approval stages. Patient advocacy organizations and support groups for cancer patients often play a role in raising awareness about oncolytic virus therapy. They may advocate for increased research funding, access to therapies, and education for patients and caregivers.

Media coverage, including news stories, documentaries, and social media discussions, can help spread the word about oncolytic virus therapy and its potential benefits. This increased visibility can generate interest and demand. Pharmaceutical companies, healthcare institutions, and nonprofit organizations often conduct educational campaigns to inform the public about oncolytic virus therapy. These campaigns aim to dispel myths, clarify the benefits, and promote the therapy's availability. Medical conferences and workshops are platforms for researchers, clinicians, and industry experts to share the latest developments in oncolytic virus therapy. This knowledge transfer helps disseminate information and promotes its adoption. Education can lead to

advocacy for supportive healthcare policies, including reimbursement and coverage by health insurance providers. When oncolytic virus therapy is financially accessible to patients, demand is likely to increase.

Educational initiatives often extend to local communities, raising awareness about cancer treatment options. Community outreach programs may encourage patients to discuss oncolytic virus therapy with their healthcare providers. Awareness campaigns and education can help spread the knowledge of oncolytic virus therapy globally, potentially increasing demand in regions where it is less widely known or accessible. Public awareness can lead to increased research funding, which, in turn, supports the development of new and improved oncolytic virus therapies. More treatment options can drive demand. Hearing success stories and testimonials from patients who have benefited from oncolytic virus therapy can be powerful motivators for others to consider this treatment option. This factor will pace up the demand of the Global Oncolytic Virus Therapy Market.

Diverse Applications

Oncolytic virus therapy is not limited to specific cancer types. It can be applied to a wide range of malignancies, including solid tumors (e.g., melanoma, lung, breast, and colorectal cancers) and hematological cancers (e.g., leukemia and lymphoma). This broad spectrum of applications means that more patients can potentially benefit from oncolytic virus therapy. Oncolytic virus therapy can be used in combination with other treatment modalities, such as chemotherapy, radiation therapy, immunotherapies (e.g., immune checkpoint inhibitors), and targeted therapies. The synergy achieved through combination therapies can enhance treatment outcomes, and this versatility drives demand. Oncolytic virus therapy is not restricted to a particular stage of cancer. It can be used in early-stage cancers as part of curative treatment or in late-stage and recurrent cancers to improve palliative care and extend survival. This flexibility increases the therapy's appeal to both patients and healthcare providers. Some oncolytic virus therapies have shown promise in treating rare and less common cancers. For patients with these conditions, oncolytic virus therapy can represent a novel and potentially more effective treatment option. Oncolytic virus therapy can be applied to localized tumors as well as to tumors that have metastasized to other parts of the body. This dual capability makes it suitable for a wide range of clinical scenarios.

In some cases, oncolytic virus therapy can be administered before or after surgery, acting as neoadjuvant or adjuvant therapy to improve the outcome of surgical interventions. This versatility contributes to its demand. For patients with advanced

cancer who may not have curative treatment options, oncolytic virus therapy can be used in palliative care to improve quality of life and extend survival. Diverse applications encourage research and clinical trials in various cancer settings. Ongoing studies and expanded applications provide data that supports the therapy's effectiveness and drive demand. Researchers are exploring the use of oncolytic virus therapy to target specific cancer subtypes with unique characteristics. This precision approach is appealing for patients with such subtypes. The ability to tailor oncolytic virus therapy to individual patients based on their genetic and molecular profiles aligns with the trend of personalized medicine, increasing its demand. This factor will accelerate the demand of the Global Oncolytic Virus Therapy Market.

Key Market Challenges

Efficacy and Safety Concerns

Efficacy can vary among different patients and cancer types. Not all patients respond equally to oncolytic virus therapy, and identifying predictors of response is an ongoing challenge. Tumors are biologically diverse, and this heterogeneity can affect the ability of oncolytic viruses to target and destroy cancer cells effectively. Adapting therapies to address tumor heterogeneity remains a challenge. The tumor microenvironment can be immunosuppressive, hindering the immune system's response to oncolytic viruses. Strategies to overcome immunosuppression are under investigation. Ensuring that oncolytic viruses specifically target cancer cells while sparing healthy tissue is a safety concern. Reducing off-target effects and minimizing collateral damage is a research priority. Tumors can develop resistance to oncolytic virus therapy over time, limiting its long-term effectiveness. Understanding and mitigating resistance mechanisms is a complex challenge. Safety concerns arise from the potential for oncolytic viruses to cause adverse events. Balancing the need for a potent antitumor effect with acceptable safety profiles is a delicate balance.

Manufacturing Complexity

Oncolytic viruses are biologically complex agents that require specialized conditions for growth, propagation, and purification. Their large size, genetic diversity, and replication requirements add to the intricacy of manufacturing. The manufacturing process must adhere to strict sterility standards to prevent contamination, as oncolytic viruses are highly sensitive to contaminants that could compromise their safety and efficacy. Ensuring that each batch of oncolytic viruses is consistent in terms of quality, potency, and safety is essential. Variability in production can lead to unpredictable treatment

outcomes. Transitioning from small-scale laboratory production to large-scale manufacturing for clinical or commercial use is challenging. Scaling up the process while maintaining product quality and safety is complex. Specialized equipment and facilities are required to produce oncolytic viruses. These facilities must meet stringent regulatory and quality standards, which can be costly to establish and maintain. Purifying oncolytic viruses from the culture medium can be challenging due to their size and biological properties. Developing efficient purification methods that yield high-quality products is a manufacturing hurdle.

Key Market Trends

Diverse Virus Platforms

Different virus platforms have unique mechanisms of tumor selectivity, replication kinetics, and host interactions. Researchers are studying these properties to optimize each platform for specific cancer types and patient populations. Combining different virus platforms with one another or with other cancer treatments, such as immunotherapies or targeted therapies, is a growing trend. These combinations offer the potential for enhanced therapeutic effects and expanded applications. The diversity of virus platforms allows for a more personalized approach to treatment. By selecting the most suitable virus platform based on a patient's cancer characteristics, oncolytic virus therapy can be tailored to individual needs. The use of diverse virus platforms can help overcome challenges related to resistance mechanisms that tumors may develop against a particular virus. By switching to a different virus platform, clinicians can potentially re-sensitize the tumor to therapy. Different virus platforms come with varying safety profiles. Researchers aim to identify platforms that minimize off-target effects and adverse events while maximizing antitumor effects. The choice of virus platform can influence the method of delivery, such as intratumoral injection, intravenous administration, or targeted delivery systems. These strategies are designed to enhance virus distribution and tumor penetration.

Segmental Insights

Virus Type Insights

In 2022, the Global Oncolytic Virus Therapy Market largest share was held by Herpes Simplex Virus (HSV) segment and is predicted to continue expanding over the coming years. Herpes Simplex Virus (HSV) has been extensively studied and engineered for oncolytic purposes. It has demonstrated efficacy in targeting and destroying cancer

cells. The robust body of research supporting HSV-based therapies may have contributed to its dominance. HSV-based oncolytic therapies were among the earliest to enter clinical trials and gain regulatory approval. Their history and experience in the field provide a foundation for their prominence. HSV-based therapies have been developed with a focus on safety, which is crucial for regulatory approval and clinical adoption. This safety profile can make them an attractive choice for patients and healthcare providers. Researchers have made significant advancements in genetically modifying HSV to enhance its tumor-targeting capabilities and reduce its impact on healthy cells. These modifications have improved the therapeutic potential of HSV-based oncolytic viruses.

Application Insights

In 2022, the Global Oncolytic Virus Therapy Market largest share was held by Malignancies segment and is predicted to continue expanding over the coming years. Malignancies, which include various forms of cancer, represent a significant healthcare challenge worldwide. Cancer is a leading cause of morbidity and mortality, and the demand for effective cancer treatments is substantial. The high prevalence of cancer necessitates a diverse range of treatment options, including oncolytic virus therapy. While significant progress has been made in cancer treatment, there are still many types of malignancies, including some advanced or treatment-resistant cancers, that do not respond well to traditional treatments such as chemotherapy, radiation therapy, or targeted therapies. This unmet medical need creates a strong demand for novel and innovative approaches like oncolytic virus therapy. Oncolytic virus therapy has shown promise in targeting a wide spectrum of malignancies, including solid tumors, hematological cancers, and various cancer subtypes. Its potential to treat multiple types of cancer makes it an attractive option for patients and healthcare providers. Ongoing research and clinical trials have demonstrated the effectiveness of oncolytic virus therapy in various malignancies. Positive results from these studies have generated interest and optimism, further driving its adoption.

End-User Insights

In 2022, the Global Oncolytic Virus Therapy Market largest share was held by Biopharmaceutical Companies segment in the forecast period and is predicted to continue expanding over the coming years. Biopharmaceutical companies typically have extensive expertise in research and development, making them well-equipped to advance oncolytic virus therapies from the laboratory to clinical trials and, eventually, to the market. These companies have the resources to conduct the necessary preclinical and clinical research, which is critical for the development of novel therapies.

Biopharmaceutical companies often have significant financial resources to invest in the research, development, and commercialization of oncolytic virus therapies. This enables them to fund costly clinical trials, manufacturing processes, and regulatory submissions. Many biopharmaceutical companies form strategic collaborations with academic institutions, research organizations, and other industry players to leverage collective expertise and resources. These partnerships can accelerate the development and market entry of oncolytic virus therapies. Biopharmaceutical companies have a global presence, which allows them to conduct multi-centre clinical trials and seek regulatory approvals in various regions simultaneously. This global reach positions them to capture a significant share of the global market.

Regional Insights

The North America region dominates the Global Oncolytic Virus Therapy Market in 2022. North America, particularly the United States and Canada, has a well-developed and advanced healthcare infrastructure. This includes a robust network of research institutions, hospitals, and biotechnology companies, making it an ideal environment for the development and commercialization of cutting-edge therapies like oncolytic virus therapy. North America is home to many prominent pharmaceutical and biotechnology companies, which invest heavily in research and development. These companies have the resources and expertise to drive innovation in the field of oncolytic virus therapy. The region has a long history of conducting clinical trials for novel medical treatments. This extensive clinical trial infrastructure allows for the testing and evaluation of oncolytic virus therapies, leading to regulatory approvals and market adoption. The U.S. Food and Drug Administration (FDA) and Health Canada have established regulatory frameworks that enable the efficient development and approval of innovative therapies. These agencies have shown openness to oncolytic virus therapies, expediting their evaluation and approval processes.

Key Market Players

Amgen Inc.

Merck & Co., Inc.

Oncolytics Biotech Inc.

PsiOxus Therapeutics Ltd.

Vyriad, Inc.

SillaJen Biotherapeutics

Cold Genesys Inc.

Sorrento Therapeutics, Inc.

Takara Bio Inc.

Replimune Group Inc.

Genelux Corporation

Report Scope:

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

Oncolytic Virus Therapy Market, By Virus Type:

Adenovirus

Herpes Simplex Virus (HSV)

Measles Virus

Reovirus

Vaccinia Virus

Vesicular Stomatitis Virus (VSV)

Others

Oncolytic Virus Therapy Market, By Application:

Solid Tumors

Hematological Malignancies

Oncolytic Virus Therapy Market, By End-User:

Hospitals

Cancer Research Institutes

Biopharmaceutical Companies

Oncolytic Virus Therapy Market, By region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

South Korea

Australia

Japan

Europe

Germany

France

United Kingdom

Spain

Italy

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Oncolytic Virus Therapy Market.

Available Customizations:

Global Oncolytic Virus Therapy Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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