

# **Pediatric Neuroblastoma Treatment Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Treatment Type (Chemotherapy, Immunotherapy, Radiation Therapy, and Others), and by End-User (Hospitals, Specialty Clinics and Others), by region, and Competition**

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## **Abstracts**

Global Pediatric Neuroblastoma Treatment Market has valued at USD 1.40 billion in 2022 and is anticipated to witness an impressive growth in the forecast period with a CAGR of 8.58% through 2028. Pediatric Neuroblastoma is a type of cancer that primarily affects young children, usually occurring in infants and toddlers but occasionally in older children. It arises from immature nerve cells (neuroblasts) that are found in various areas of the body, most commonly in the adrenal glands, which sit on top of the kidneys. However, it can also develop in other parts of the sympathetic nervous system, including the chest, abdomen, and pelvis. The symptoms of neuroblastoma vary depending on the tumor's size, location, and whether it has spread. Common symptoms may include abdominal swelling, pain, a lump or mass, weight loss, loss of appetite, bone pain, irritability, fever, and changes in the eyes (such as drooping eyelids or unequal pupil size). Diagnosis often involves a combination of imaging tests, such as ultrasound, CT scans, and MRI scans, to locate and evaluate the tumor. Biopsy and bone marrow aspiration may also be performed to confirm the diagnosis and determine the tumor's aggressiveness.

An increase in the number of pediatric neuroblastoma cases worldwide has driven the demand for treatments. Factors contributing to this rise may include improved diagnostic techniques and increased awareness leading to early detection. Ongoing research and development efforts have led to the discovery of new treatment

modalities, targeted therapies, and innovative drug formulations that offer improved outcomes for pediatric neuroblastoma patients. The pharmaceutical industry and research institutions conduct clinical trials to test new therapies and treatment approaches. The participation of pediatric neuroblastoma patients in these trials provides access to cutting-edge treatments and fosters market growth. Pediatric cancer awareness and advocacy organizations work to raise awareness about neuroblastoma, promote early diagnosis, and provide support for patients and their families. Increased awareness can lead to greater demand for treatments.

## Key Market Drivers

### Rising Incidence of Pediatric Neuroblastoma

Growing awareness among healthcare providers and the public about the signs and symptoms of pediatric neuroblastoma has led to earlier diagnosis. As more cases are detected at an earlier stage, there is a greater need for timely and effective treatment. Improved diagnostic techniques, such as genetic testing and advanced imaging, have made it easier to identify neuroblastoma cases accurately. This early detection allows for prompt intervention and treatment. The general growth in the global population, including the pediatric population, naturally leads to an increase in the number of neuroblastoma cases. While the exact causes of neuroblastoma remain unclear, some environmental and genetic factors may contribute to its development. As these factors continue to be studied, it may become possible to identify at-risk populations more effectively. The rising incidence of neuroblastoma has prompted increased research into potential treatments. Clinical trials and research efforts are essential in developing new therapies, which, in turn, drive the demand for Pediatric Neuroblastoma Treatment. The development of more effective and less toxic treatment options has improved the chances of successful outcomes for neuroblastoma patients. This has increased the demand for these treatments as they become more accessible. Advances in supportive care for pediatric cancer patients have improved overall treatment experiences and outcomes. As the quality of care continues to improve, more families seek treatment for their children. Improved access to healthcare services in various regions around the world means that more children with neuroblastoma are receiving appropriate treatment. This factor will help in the development of the Global Pediatric Neuroblastoma Treatment Market.

### Advancements in Medical Research

Researchers have made substantial progress in understanding the genetic and

molecular characteristics of neuroblastoma tumors. This has led to the identification of specific genetic mutations and alterations associated with the disease. This information is crucial for developing targeted therapies and personalized treatment approaches. Advances in research have led to the development of targeted therapies that aim to specifically inhibit the activity of genes or proteins involved in neuroblastoma growth. For example, drugs targeting the ALK gene mutation have shown promise in treating neuroblastoma patients with this specific genetic alteration. Immunotherapy, such as chimeric antigen receptor (CAR) T-cell therapy and immune checkpoint inhibitors, has emerged as a groundbreaking approach in pediatric neuroblastoma treatment. These therapies harness the body's immune system to recognize and attack cancer cells. Researchers are actively identifying biomarkers, which are specific molecules or indicators associated with the disease. Biomarkers can be used for early detection, monitoring treatment response, and predicting outcomes in neuroblastoma patients.

Liquid biopsy techniques are being developed to detect tumor-specific DNA or RNA in blood or other bodily fluids. This non-invasive approach may provide valuable information about the presence of neuroblastoma and its genetic characteristics. Ongoing clinical trials are testing new treatment modalities, drug combinations, and therapeutic approaches. These trials offer pediatric neuroblastoma patients access to cutting-edge treatments and help advance the field. Refinements in radiation therapy techniques, including proton therapy and stereotactic radiosurgery, are reducing the potential long-term side effects of radiation while effectively targeting neuroblastoma tumors. Research in supportive care focuses on improving the quality of life for pediatric neuroblastoma patients by managing treatment-related side effects, pain, and psychosocial needs. Collaboration among research institutions, healthcare providers, and pharmaceutical companies on a global scale has accelerated progress in pediatric neuroblastoma research. International collaborations allow for larger patient populations and more extensive data sharing. Research is also focused on long-term survivorship care for pediatric neuroblastoma survivors, addressing late effects of treatment and providing ongoing monitoring and support. This factor will pace up the demand of the Global Pediatric Neuroblastoma Treatment Market.

### Rise in Clinical Trials and Drug Development

Clinical trials provide access to novel and experimental treatments that may not be available through standard care. This attracts pediatric neuroblastoma patients and their families who are seeking the latest and potentially more effective treatment options. The process of drug development involves extensive research aimed at discovering and testing new drugs and treatment modalities. The progression from preclinical studies to

clinical trials requires a substantial investment in research and development, which contributes to the availability of new treatment options. Clinical trials are designed to evaluate the safety and effectiveness of new therapies. Positive results from these trials can lead to the approval and commercial availability of these treatments, driving demand for effective pediatric neuroblastoma therapies. Research in pediatric neuroblastoma has advanced our understanding of the genetic and molecular factors that influence the disease. This knowledge has led to the development of targeted therapies tailored to the individual characteristics of a patient's tumor, contributing to improved treatment outcomes.

Clinical trials often explore the effectiveness of combining different treatment approaches, such as chemotherapy with immunotherapy or radiation therapy. These combination therapies may offer synergistic benefits in treating neuroblastoma, further increasing treatment options. Clinical trials are frequently conducted on an international scale, involving multiple research institutions, healthcare providers, and pharmaceutical companies. This collaboration expands the reach of clinical trials and enhances the potential for enrolling a diverse group of patients. Successful completion of clinical trials and the subsequent approval of new drugs or treatment protocols by regulatory agencies (e.g., the FDA in the United States) can lead to their inclusion in treatment guidelines and recommendations, increasing their adoption. Pediatric oncology is a dynamic field, and the continuous pursuit of better treatments for childhood cancers, including neuroblastoma, drives demand for the latest advancements in drug development and clinical research. Advocacy groups and organizations focused on pediatric neuroblastoma often play a crucial role in raising awareness of clinical trials and encouraging patient participation. They help connect patients and families with relevant clinical trials. Clinical trials generate valuable data that contribute to collective knowledge about pediatric neuroblastoma treatment. The sharing of research findings and data supports ongoing research efforts and informs future treatment strategies. This factor will accelerate the demand of the Global Pediatric Neuroblastoma Treatment Market.

## Key Market Challenges

### Toxicity and Long-Term Effects

The standard treatments for pediatric neuroblastoma, which often include chemotherapy, radiation therapy, and surgery, can cause severe side effects in young patients. These treatments may damage healthy tissues and organs in addition to targeting cancer cells. The toxicity can result in short-term complications, such as

nausea, fatigue, and hair loss, which can significantly impact a child's quality of life during treatment. Beyond the immediate treatment period, pediatric neuroblastoma survivors may face long-term health issues and late effects of treatment. These can include developmental delays, growth problems, hormonal imbalances, organ dysfunction, and an increased risk of secondary cancers. Monitoring and managing these long-term health issues require ongoing medical care and support. The toxicity and long-term effects of treatment can affect a child's physical and emotional well-being, as well as their ability to engage in normal childhood activities. This can have a lasting impact on their quality of life and overall development. Pediatric neuroblastoma and its treatment can take a toll on the psychological well-being of both patients and their families. Coping with treatment-related toxicity and long-term effects can be emotionally challenging, requiring psychosocial support and mental health services. Pediatric neuroblastoma survivors often require specialized survivorship care to address the unique health issues that may arise years after treatment. Access to comprehensive follow-up care and support services is essential to managing these long-term effects effectively. Finding the right balance between delivering effective treatment and minimizing toxicity is a complex challenge in pediatric neuroblastoma care. Oncologists must make treatment decisions that maximize the chances of a cure while minimizing potential harm.

### Late Diagnosis

Neuroblastoma is often diagnosed at an advanced stage, which makes treatment more challenging. Late diagnosis means that the cancer has had more time to spread to other parts of the body (metastasize), requiring more aggressive treatment approaches. Advanced-stage neuroblastoma may have fewer treatment options available compared to early-stage disease. Late diagnosis may limit the effectiveness of certain treatments, potentially impacting the chances of a favorable outcome. The prognosis for pediatric neuroblastoma is significantly better when the cancer is diagnosed at an earlier stage. Late diagnosis can lead to lower survival rates and poorer long-term outcomes for affected children. Late-stage neuroblastoma often requires more intensive and aggressive treatments, such as high-dose chemotherapy, radiation therapy, and stem cell transplantation. These treatments can have more significant side effects and long-term complications. Late diagnosis can have a profound psychological and emotional impact on the child and their family. Coping with a late-stage cancer diagnosis can be extremely distressing, and families may experience heightened anxiety and emotional stress. Late diagnosis can result in delays in accessing specialized pediatric oncology care. Timely access to experienced medical teams is crucial for developing and implementing an effective treatment plan. Neuroblastoma tends to metastasize to

distant sites, such as the bones, bone marrow, and other organs. Late diagnosis increases the risk of cancer cells spreading to these critical areas, making treatment more complex. Neuroblastoma can present with vague and non-specific symptoms, especially in its early stages. These symptoms, such as abdominal pain, weight loss, and fatigue, can be attributed to other common childhood illnesses, leading to delayed diagnosis.

## Key Market Trends

### Minimizing Radiation

Radiation therapy, while effective in treating neuroblastoma, can cause long-term side effects, especially in pediatric patients. These side effects may include growth abnormalities, developmental delays, and an increased risk of secondary cancers. Minimizing radiation aims to mitigate these risks. Innovations in radiation therapy techniques, such as intensity-modulated radiation therapy (IMRT) and proton therapy, allow for more precise targeting of cancer cells while sparing nearby healthy tissues. This precision reduces the potential for collateral damage and long-term toxicity. Radiation oncologists are increasingly tailoring treatment plans to each patient's specific needs and tumor characteristics. This individualized approach ensures that the minimum necessary radiation dose is used while maximizing therapeutic benefits. Minimizing radiation is often achieved through combination therapies. For instance, using chemotherapy or surgery to shrink tumors before radiation may allow for lower radiation doses and less toxicity. Risk stratification of neuroblastoma patients helps determine the appropriate level of treatment intensity. Low-risk patients may receive less aggressive therapy, including reduced radiation, to minimize long-term effects. Ongoing clinical trials are exploring novel treatment approaches that may reduce the reliance on radiation therapy or allow for lower radiation doses. These trials aim to maintain or improve treatment outcomes while minimizing toxicity. As more children with neuroblastoma survive into adulthood, there is a growing emphasis on long-term survivorship care. Minimizing radiation plays a role in reducing the late effects of treatment and improving the quality of life for survivors.

### Segmental Insights

#### Treatment Type Insights

In 2022, the Global Pediatric Neuroblastoma Treatment Market largest share was held by Chemotherapy segment and is predicted to continue expanding over the coming



years. Chemotherapy has long been a standard treatment for pediatric neuroblastoma. It is often one of the first-line therapies used to target cancer cells throughout the body, especially when the disease has spread or is in advanced stages. Chemotherapy is used before surgery (resection) in many cases to shrink tumours, making them more manageable and easier to remove. This is called neoadjuvant chemotherapy. After surgical removal of tumours, chemotherapy may be administered to eliminate any remaining cancer cells and reduce the risk of recurrence. This is known as adjuvant chemotherapy. Chemotherapy is frequently combined with other treatment modalities, such as radiation therapy and immunotherapy, to enhance the overall effectiveness of treatment. Neuroblastoma often presents with metastasis (spread) to other parts of the body, making chemotherapy an essential component of treatment to target cancer cells wherever they may be located. In high-risk cases, which are more aggressive and have a poorer prognosis, chemotherapy is a critical component of the treatment plan to improve outcomes. Chemotherapy regimens are often tested and refined through clinical trials, which can lead to the development of more effective and less toxic chemotherapy protocols.

## End-User Insights

In 2022, the Global Pediatric Neuroblastoma Treatment Market largest share was held by Hospitals segment in the forecast period and is predicted to continue expanding over the coming years. Hospitals are equipped to provide comprehensive care for pediatric neuroblastoma patients. They have multidisciplinary teams of healthcare professionals, including pediatric oncologists, surgeons, radiologists, pathologists, and nurses, who work together to develop and implement treatment plans tailored to the specific needs of each patient. Many hospitals have specialized pediatric oncology units or children's hospitals that are dedicated to treating pediatric cancer patients. These units are staffed with experts who have specialized training and experience in caring for children with cancer. Hospitals typically have access to advanced diagnostic tools, such as MRI and CT scans, as well as state-of-the-art treatment facilities, including surgical suites, radiation therapy centres, and infusion centres where chemotherapy and other treatments are administered. Hospitals often participate in clinical trials and research initiatives focused on pediatric neuroblastoma. This allows patients to access cutting-edge treatments and therapies that may not be available elsewhere. Hospitals offer a range of support services for pediatric neuroblastoma patients and their families. This includes psychosocial support, child life specialists, social workers, and support groups to help families cope with the emotional and practical challenges of cancer treatment.

## Regional Insights

The North America region dominates the Global Pediatric Neuroblastoma Treatment Market in 2022. North America, particularly the United States and Canada, has a well-developed and advanced healthcare infrastructure. This includes a network of specialized pediatric cancer treatment centers, research institutions, and hospitals that can provide comprehensive care for pediatric neuroblastoma patients. The region is a hub for medical research and innovation. It hosts many leading research institutions, universities, and pharmaceutical companies that drive advancements in pediatric neuroblastoma treatment. This fosters the development of cutting-edge therapies and clinical trials. North America often leads in conducting clinical trials for pediatric cancer treatments, including neuroblastoma. Patients in the region may have better access to experimental treatments and therapies through these trials. The region has substantial healthcare funding and investment, which can support the development of new treatments and technologies for pediatric neuroblastoma.

### Key Market Players

United Therapeutics Corporation

APEIRON Biologics AG

Baxter International Inc.

Cell Ectar Biosciences Inc.

Pfizer Inc.

Bayer AG

Provectus Biopharmaceuticals Inc.

Sartorius AG

Amgen Inc.

F. Hoffmann-La Roche AG

Report Scope:



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

Pediatric Neuroblastoma Treatment Market, By Treatment Type:

Chemotherapy

Immunotherapy

Radiation Therapy

Others

Pediatric Neuroblastoma Treatment Market, By End-User:

Hospitals

Specialty clinics

Others

Global Pediatric Neuroblastoma Treatment 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 present in the Global Pediatric Neuroblastoma Treatment Market.

### Available Customizations:

Global Pediatric Neuroblastoma Treatment 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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