

Soft Tissue Sarcoma Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Treatment Type (Targeted Therapy, Chemotherapy, Anti-Angiogenesis Drugs, Radiation Therapy, Others), By End User (Hospitals, Homecare, Specialty Centers, Others), By Region and Competition, 2019-2029F

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Abstracts

Global Soft Tissue Sarcoma Market was valued at USD 1.36 Billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 8.45% through 2029. Surgery is typically the primary treatment approach for soft tissue sarcomas, involving the removal of the tumor or a portion of the affected area. Radiation therapy may also be employed to shrink or eradicate the tumor, either in combination with surgery or as a standalone treatment. Chemotherapy is commonly utilized as an adjunctive therapy to enhance the effectiveness of other treatment modalities. The prognosis for soft tissue sarcomas can vary significantly, contingent upon the type, location, and stage of the cancer. Generally, an earlier diagnosis and prompt treatment yield more favorable outcomes. It is crucial to remain up to date with advancements in the field, as treatment options and prognoses continue to evolve and improve. Clinical trials play a critical role in accessing state-of-the-art treatments and gaining further insights into optimal approaches for soft tissue sarcomas. Participation in clinical trials can contribute to improved outcomes and enhanced quality of life for patients with soft tissue sarcomas. Soft tissue sarcomas can be effectively treated by a blend of surgery, radiation therapy, and/or chemotherapy. Prognosis for soft tissue sarcomas depends on various factors, including the type, location, and stage of the cancer. Ongoing clinical trials and research provide valuable information to refine treatment strategies and enhance outcomes and quality of life. While surgery, radiation therapy, and chemotherapy are the most common treatments for soft tissue sarcomas, alternative

options such as immunotherapy, targeted therapy, and herbal medicine have demonstrated efficacy in managing the condition. Also, lifestyle modifications, including dietary adjustments and exercise, can help reduce the risk of developing soft tissue sarcomas and assist in the recovery process.

Key Market Drivers

Increase in Cancer Cases

Sarcoma is a type of cancer that can affect various tissues. Soft tissue sarcomas specifically impact the connective, supportive, or surrounding tissues of the body's systems. According to the American Society of Clinical Oncology (ASCO), soft tissue sarcomas account for approximately 1% of all adult cancers. Although more prevalent in children, comprising around 15% of all childhood cancers, it remains a significant concern. Besides, the National Cancer Institute estimates that in 2019, approximately 12,750 cases of soft tissue sarcoma were diagnosed in the United States, with an estimated 5,270 resulting in death. In addition, the American Cancer Society reported approximately 3,600 new cases of bone and joint cancer in 2020, with 2,120 cases among males and 1,480 among females in the United States. On top of that, an estimated 1,720 deaths in the U.S. in 2020 were attributed to bone and joint cancer. Looking ahead, the American Cancer Society projects that approximately 13,590 new cases of soft tissue sarcoma will be diagnosed in 2024. Of these, 7,700 cases are expected among males and 5,890 among females in the United States. It is estimated that around 5,200 individuals (2,760 males and 2,440 females) will succumb to soft tissue sarcomas, according to the same source.

Development of New and Innovative Therapies

The development of new and innovative therapies is playing a crucial role in boosting the growth of the Soft Tissue Sarcoma (STS) market. Soft tissue sarcomas are a diverse group of rare cancers that develop in the connective tissues of the body, including muscles, fat, blood vessels, and nerves. Historically, treatment options for STS have been limited, but advancements in research and the introduction of novel therapies are changing the landscape. The introduction of new therapies, such as targeted therapies, immunotherapies, and precision medicine approaches, provides patients with a broader range of treatment options beyond traditional approaches like surgery, radiation, and chemotherapy. Innovative therapies are designed to specifically target the underlying genetic and molecular characteristics of STS tumors. This personalized approach can lead to improved patient outcomes, including better

response rates and longer survival. Advanced diagnostics and biomarker testing enable the identification of specific mutations or genetic markers that guide treatment decisions. This allows for more individualized and effective treatment plans. Advances in understanding the genetic mutations driving STS have led to the development of targeted therapies that specifically inhibit the signaling pathways responsible for tumor growth.

Rise In the Number of Product Approval for New Sarcoma Drugs

The increase in the number of approved products for new sarcoma drugs has contributed to the growth of the sarcoma drugs market. For example, in May 2020, Bristol Myers Squibb, a pharmaceutical company, announced the approval of Pomalyst (pomalidomide) by the U.S. Food and Drug Administration (FDA). This approval was specifically for patients with AIDS-related Kaposi sarcoma whose disease has become resistant to highly active antiretroviral therapy (HAART), or for patients with Kaposi sarcoma who are HIV-negative.

The approval of new sarcoma drugs adds diversity to the available treatment options. Different types of STS require tailored approaches, and a broader range of approved drugs enables healthcare providers to choose the most suitable treatment for each patient. New drugs that demonstrate efficacy in clinical trials can lead to improved survival rates and disease control, positively impacting the overall prognosis for STS patients. The approval of new sarcoma drugs encourages pharmaceutical companies and researchers to invest in innovative research, which can lead to the development of even more effective treatments. Regulatory approval allows a broader patient population to access the newly approved drugs, reaching more patients in need of effective therapies.

Rise In Adoption of Key Strategies Such as Collaboration and Acquisition

The rise in adoption of key strategies, such as collaboration, acquisition, agreement, and partnership, by the sarcoma drugs industry is driving the growth of the market. For example, in March 2021, Phio Pharmaceuticals Corp., a biotechnology company developing the next generation of immuno-oncology therapeutics based on its proprietary self-delivering RNAi (INTASYL) therapeutic platform, announced a clinical development collaboration with AgonOx, Inc. The collaboration aims to develop novel T cell-based cancer immunotherapies using Phio's lead INTASYL-based product candidate, PH-762, and AgonOx's 'double positive' (DP) tumor-infiltrating lymphocyte (TIL) technology. Collaborative efforts can lead to the exploration of combination

therapies, where different companies contribute complementary treatment approaches that, when combined, yield more effective results. Partnering with or acquiring companies with advanced technologies can lead to the development of innovative drug delivery methods, diagnostic tools, and personalized treatment approaches.

Collaboration can expedite research efforts by allowing companies to share data, insights, and resources. This accelerates the identification of potential targets and the development of new therapies. Collaborative efforts can lead to larger and more diverse clinical trials, which provide a more comprehensive evaluation of the safety and efficacy of potential STS treatments. Companies that collaborate or acquire specialized partners may benefit from streamlined regulatory pathways, leading to faster approvals and market entry for new therapies.

Key Market Challenges

High Cost of Treatments

High treatment costs can limit patient access to effective therapies, especially for individuals without adequate insurance coverage or financial resources. This can lead to delayed or suboptimal treatment, negatively impacting patient outcomes. The high out-of-pocket costs associated with STS treatments can place a significant financial burden on patients and their families, potentially leading to financial hardship and reduced quality of life. High treatment costs can attract public and regulatory scrutiny, leading to pricing pressure and potential limitations on reimbursement and coverage. The substantial costs associated with treatment methods hinder market growth. Several treatments for this disease are expensive, posing challenges for individuals, particularly those in rural areas. Consequently, this becomes a significant obstacle for the market. The rising expenses of radiotherapy and chemotherapy might impede the growth of the soft tissue sarcoma treatment market in the forecast period.

Side-Effects of Soft Tissue Sarcoma Drugs

The presence of significant side effects associated with Soft Tissue Sarcoma (STS) drugs can hinder the growth of the STS market. Side effects can impact patient quality of life, influence treatment decisions, and contribute to challenges in patient adherence and acceptance of treatments. Severe side effects can lead to decreased patient quality of life, affecting their ability to perform daily activities, work, and engage in social interactions. This can discourage patients from pursuing or continuing treatment. Patients experiencing intolerable side effects might choose to discontinue treatment

prematurely, potentially reducing the effectiveness of the therapy and hindering positive treatment outcomes. Elderly or frail patients might be more susceptible to side effects, limiting the use of certain drugs in this population and potentially reducing the market demand.

Key Market Trends

Introduction of Other Therapies

The availability of many therapies offers healthcare providers a broader range of options to tailor treatment plans based on the specific subtype, stage, and characteristics of each patient's STS. With a variety of therapies to choose from, physicians can personalize treatment approaches, optimizing the chance of positive responses and minimizing adverse effects. Different STS subtypes have varying responses to treatments. The introduction of multiple therapies can help address unmet medical needs for subtypes that lack effective treatment options. A multitude of therapies can lead to better patient outcomes, including increased survival rates, enhanced quality of life, and better management of disease-related symptoms. The availability of many therapies encourages healthy market competition among pharmaceutical companies, leading to innovation, price competition, and improved treatment quality. For over four decades, the cornerstone of localized sarcoma treatment has involved surgical resection followed by neoadjuvant or adjuvant radiation or chemotherapy. However, even after completing surgical resection, approximately 50.0% of patients with intermediate or high-grade sarcoma develop metastatic disease. The advent of targeted therapy has brought about a paradigm shift in the treatment approach for sarcoma. Targeted therapies and upcoming breakthroughs in the pipeline will continue to play a pivotal role in driving market growth throughout the forecast period.

Rising Healthcare Awareness

There is a growing awareness among patients and healthcare providers regarding the incidence of liposarcoma. Both patients and doctors are actively engaging in learning about the available therapies for treating these severe diseases, leading to increased market opportunities. Increased awareness prompts patients to seek medical attention at earlier stages of the disease, leading to timely diagnosis and treatment initiation. Early detection can result in better treatment outcomes and potentially higher survival rates. Patients and healthcare providers who are more informed about available therapies can make more educated treatment decisions, leading to improved patient management and adherence to treatment plans. The increasing awareness about the

incidence of liposarcoma among patients and healthcare providers creates a ripple effect that positively impacts diagnosis, treatment, research, advocacy, and market growth. As more attention is focused on this rare cancer, opportunities arise for collaboration, innovation, and improved patient care within the liposarcoma market.

Segmental Insights

Treatment Type Insights

The segment of anti-angiogenesis drugs is projected to experience rapid growth during the forecast period. This can be attributed to the growing demand for these drugs in cancer treatment. The prevalence of cancer and the necessity for effective therapies are driving factors behind this segment. Anti-angiogenesis drugs employ a molecular approach to hinder the formation of new blood vessels, which are essential for tumor growth and spread. This approach shows promise due to its relatively lower side effects compared to chemotherapy and radiation. In addition, the advent of innovative cancer treatments like immunotherapy and gene therapy is expected to contribute to the expansion of the anti-angiogenesis drugs segment. As these treatments become more accessible, the demand for anti-angiogenesis drugs is anticipated to rise. Plus, the increasing demand for personalized medicines is likely to create new opportunities for segment growth. However, the high cost of these treatments may impose limitations on the expansion of the anti-angiogenesis drugs segment.

End User Insights

Based on the end user segmentation, the market is categorized into hospitals, homecare, specialty centers, and others. The hospitals segment held the largest market share in 2023 and is projected to maintain its dominance throughout the forecast period. This can be attributed to increased government expenditure aimed at the development of the healthcare sector. Hospitals offer comprehensive treatment facilities for soft tissue sarcoma patients, including diagnostic imaging, surgical intervention, chemotherapy, radiation therapy, and supportive care services. These facilities allow for multidisciplinary collaboration among oncologists, surgeons, radiologists, pathologists, and other healthcare professionals, ensuring that patients receive integrated and coordinated care across all stages of their treatment journey.

Hospitals play a central role in the management of soft tissue sarcomas by providing specialized expertise, comprehensive treatment facilities, advanced medical technologies, access to clinical trials and research, and supportive care services. As a

result, they are the primary setting where patients with soft tissue sarcomas receive diagnosis, treatment, and ongoing care, making hospitals the dominant end-user in the Global Soft Tissue Sarcoma Market.

Regional Insights

The demand for soft tissue sarcomas in North America is projected to experience substantial growth during the forecast period. This can be attributed to the rising incidence of this cancer type in the region, coupled with the availability of advanced treatment options. Likewise, the increasing emphasis on research and development of innovative therapies, including immunotherapies and targeted therapies, is anticipated to propel the demand for soft tissue sarcomas in North America. Also, the growing prevalence of personalized medicines and the presence of improved healthcare infrastructure in the region are expected to further drive the demand. However, it is important to note that the high cost of treatments may act as a limiting factor for the growth of this segment in the region.

Key Market Players

F. Hoffmann-La Roche Ltd.

Mylan N.V.

Teva Pharmaceutical Industries Ltd.

Sanofi S.A.

Pfizer Inc.

GSK plc

Novartis AG

Bayer AG

Sun Pharmaceutical Industries Ltd.

Merck Co., Inc.

Report Scope:

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

Soft Tissue Sarcoma Market,By Treatment Type:

- oTargeted Therapy

- oChemotherapy

- oAnti-Angiogenesis Drugs

- oRadiation Therapy

- oOthers

Soft Tissue Sarcoma Market,By End User:

- oHospitals

- oHomecare

- oSpecialty Centres

- oOthers

Soft Tissue Sarcoma Market, By Region:

- oNorth America

 - United States

 - Canada

 - Mexico

oEurope

France

United Kingdom

Italy

Germany

Spain

oAsia-Pacific

China

India

Japan

Australia

South Korea

oSouth America

Brazil

Argentina

Colombia

oMiddle East Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Soft Tissue Sarcoma Market.

Available Customizations:

Global Soft Tissue Sarcoma marketreport 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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