

Targeted Cancer Therapy Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Therapy Type (Hormone Therapies, Monoclonal Antibodies, Signal Transduction Inhibitors, Gene Expression Modulators, Apoptosis Inhibitors, Others), By Disease Indication (Lung Cancer, Breast Cancer, Colorectal Cancer, Leukemia, Melanoma, Lymphoma, Others), By End User (Hospitals & Clinics, Cancer & Radiation Therapy Centers, Academic & Research Institutions), By Region and Competition

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Abstracts

Global Targeted Cancer Therapy Market is anticipated to project impressive growth in the forecast period. The Global Targeted Cancer Therapy Market represents a dynamic and rapidly growing segment of the larger oncology market. Specifically, it focuses on innovative treatments that target the specific genetic mutations, abnormal proteins, or the tumor microenvironment that contribute to cancer growth and survival. These therapies are meticulously designed to enhance treatment efficacy while minimizing the often debilitating side effects associated with conventional cancer treatments like chemotherapy and radiation.

This expansive market encompasses a wide range of products, including monoclonal antibodies, small molecules, kinase inhibitors, immune checkpoint inhibitors, and more. The continuous advancements in research and development, coupled with ongoing clinical trials, contribute to the ever-expanding landscape of targeted cancer therapy.

With each new breakthrough, there is renewed hope for improved patient outcomes and a brighter future in the fight against cancer.

Key Market Drivers

Increasing Prevalence of Various Type of Cancers

The increasing prevalence of various types of cancers is driving a surge in the demand for targeted cancer therapy. Cancer remains one of the most formidable health challenges globally, with its incidence rising due to factors such as aging populations, lifestyle changes, and environmental factors. In this landscape, targeted cancer therapy has emerged as a revolutionary approach, offering more precise and effective treatments compared to traditional chemotherapy and radiation.

The demand for targeted cancer therapy is further accelerated by the growing emphasis on personalized medicine. Advancements in genomics and molecular diagnostics enable healthcare providers to identify specific genetic mutations or biomarkers in a patient's cancer, guiding the selection of the most appropriate targeted therapy. This personalized approach ensures that patients receive treatments tailored to their unique cancer profiles, maximizing the chances of success. With cancer rates on the rise globally, the demand for targeted cancer therapy is expected to continue its upward trajectory. The promise of more effective treatments with fewer side effects, coupled with the increasing availability of genomic testing, positions targeted cancer therapy as a vital component in the fight against cancer, offering hope to countless individuals affected by this devastating disease.

Increasing Investment in Research and Development

The increasing investment in research and development (R&D) is playing a pivotal role in driving the demand for targeted cancer therapy. Cancer remains a leading cause of mortality worldwide, spurring relentless efforts to develop more effective and precise treatment options. Targeted cancer therapy, which focuses on inhibiting specific molecular pathways involved in cancer growth, has become a focal point of this R&D investment due to its potential to revolutionize cancer treatment.

The advent of precision medicine has further fueled the demand for targeted cancer therapy. Advancements in genomics and molecular profiling techniques enable healthcare providers to identify specific genetic mutations and biomarkers in individual patients' tumors. This allows for the selection of the most suitable targeted therapy

based on a patient's unique cancer profile, maximizing treatment efficacy.

Moreover, collaborations between pharmaceutical companies, academic institutions, and research organizations have accelerated the translation of scientific discoveries into clinical applications. These partnerships facilitate the development and clinical testing of novel targeted therapies, bringing them to the market faster and broadening the range of treatment options available to patients. As investment in R&D continues to grow and our understanding of cancer biology becomes increasingly refined, the demand for targeted cancer therapy is expected to rise. This promising field offers hope for improved patient outcomes, reduced side effects, and a brighter future in the fight against cancer.

Increasing Regulatory Body Approvals

Key players in the market are actively pursuing regulatory body approvals for their products, a strategic move that is anticipated to significantly drive the market growth over the forecast period. For instance, in August 2022, the U.S. Food and Drug Administration (FDA) granted approval for the first targeted therapy, Trastuzumab Deruxtecan (T-DXd), specifically designed for patients with HER2-low breast cancer that has metastasized and cannot be surgically removed.

This groundbreaking drug, developed through extensive research and clinical trials conducted under the leadership of the renowned Memorial Sloan Kettering Cancer Center (MSK), has shown promising results in improving patient outcomes. The successful outcome of this trial not only highlights the potential of T-DXd as an innovative treatment option but also brings hope to patients and further advances the field of oncology. With its approval, T-DXd is expected to provide a much-needed solution for patients facing this specific type of breast cancer, offering new possibilities and improving quality of life. The pursuit of regulatory approvals by key industry players demonstrates their commitment to bringing innovative treatments to the market and addressing unmet medical needs. This dedication to research and development underscores the continuous efforts to improve patient care and push the boundaries of medical advancements.

As the market continues to evolve and new treatments emerge, the collaboration between regulatory bodies, research institutions, and pharmaceutical companies becomes increasingly important. This multidisciplinary approach not only ensures the safety and efficacy of novel therapies but also fosters a collaborative environment that encourages innovation and accelerates progress in the field of oncology.

Advances In Genomic Sequencing Technology

Advances in genomic sequencing technology are driving a substantial increase in the demand for targeted cancer therapy. Genomic sequencing has become a cornerstone of cancer research and treatment, enabling healthcare professionals to delve deep into the genetic makeup of tumors and identify specific mutations and alterations that drive cancer growth. This knowledge has paved the way for the development and optimization of targeted therapies, which are tailored to the genetic characteristics of individual patients' cancers.

Ongoing advancements in genomic sequencing technology, such as single-cell sequencing and liquid biopsy techniques, are expanding the range of genomic information available to inform treatment decisions. These innovations offer opportunities for earlier cancer detection, monitoring treatment responses, and detecting the emergence of drug resistance.

As genomic sequencing becomes more accessible and affordable, the demand for targeted cancer therapy is expected to continue to rise. This synergy between cutting-edge technology and tailored treatment strategies represents a promising frontier in the fight against cancer, offering hope for improved patient outcomes and a brighter future in cancer care.

Key Market Challenges

High Cost and Side Effects Associated with the Targeted Therapies

The high cost associated with cancer treatment drugs is expected to act as a significant restraint for the market's growth over the forecast period. This financial burden is a pressing concern, as highlighted by an article published by the American Association for Cancer Research (AACR) in June 2020. The article reveals that the national cancer-attributable costs in the U.S. are projected to increase by over 30% from 2015 to 2030, reaching a staggering total cost of over US\$ 245 billion. These rising costs have far-reaching consequences, impacting not only patients but also healthcare systems and society as a whole.

The impact of these costs is felt at various stages of the disease, with the cancer-attributable annualized average medical cost in the initial, continuing, and non-cancer end-of-life phases estimated at US\$ 41,800, US\$ 5,300, and US\$ 23,500 per patient,

respectively. These figures underscore the financial challenges faced by patients and healthcare systems alike, highlighting the urgent need for solutions that can alleviate the burden and ensure access to affordable cancer treatments.

Furthermore, the increasing costs of cancer treatments put a strain on the overall healthcare infrastructure, affecting resource allocation and budget planning. The financial implications extend beyond individual patients, impacting insurance providers, hospitals, and government healthcare programs. This complex issue necessitates a comprehensive approach that takes into account not only the affordability of drugs but also the long-term sustainability of healthcare systems. In light of these challenges, stakeholders in the cancer treatment industry are actively seeking innovative solutions to address the rising costs. This includes exploring alternative pricing models, advocating for policy changes, and promoting research and development of cost-effective therapies. The goal is to strike a balance between patient access to life-saving treatments and the economic viability of healthcare systems.

Risks of Severe Side Effects

The risks of severe side effects associated with targeted cancer therapy are paradoxically decreasing the demand for this treatment approach in some cases. While targeted therapies are celebrated for their precision in attacking cancer cells, they are not without their own set of side effects and limitations, and these factors have contributed to a more nuanced perspective among both patients and healthcare providers. The high cost of targeted cancer therapies can be prohibitive, creating a barrier to access for many patients. The economic burden associated with these treatments, combined with the potential for ongoing side effects, has led some individuals and healthcare systems to consider other treatment options. While targeted cancer therapy has made significant strides in improving cancer treatment, it is not a one-size-fits-all solution. Patients and healthcare providers must carefully weigh the potential benefits against the risks and limitations of these therapies, which can sometimes lead to a decreased demand for targeted treatments in certain clinical scenarios.

Key Market Trends

Advancements In Genomic Profiling and Precision Medicine

Advancements in genomic profiling and precision medicine are poised to significantly increase the demand for targeted cancer therapy. Genomic profiling technologies have

revolutionized our understanding of cancer by enabling comprehensive analysis of a patient's tumor DNA, pinpointing specific genetic mutations and alterations driving cancer growth. This knowledge forms the basis for precision medicine, a patient-centric approach to cancer treatment that tailors therapies to the genetic characteristics of each individual's cancer. Advancements in genomic profiling techniques, such as next-generation sequencing (NGS) and liquid biopsies, have made these technologies more accessible and efficient. This has resulted in broader adoption across healthcare systems, allowing more patients to benefit from precision medicine approaches.

Precision medicine also extends beyond the initial treatment phase. Genomic profiling can help identify potential drug resistance mechanisms or mutations that may emerge during treatment, allowing healthcare providers to adapt treatment strategies in real-time, increasing the chances of long-term treatment success. As genomic profiling and precision medicine continue to evolve, the demand for targeted cancer therapy is expected to grow. The promise of improved patient outcomes, reduced side effects, and more effective treatments positions targeted therapy as a cornerstone of modern cancer care, offering hope to patients and healthcare providers in the fight against this complex disease.

Increased Focus on Personalized Treatments

The increased focus on personalized treatments in oncology is expected to substantially boost the demand for targeted cancer therapy. Cancer, a highly heterogeneous disease, varies greatly from one patient to another based on genetic mutations, biomarkers, and other factors. As our understanding of the molecular underpinnings of cancer has deepened, the shift towards personalized treatments has become increasingly evident, and targeted cancer therapy has emerged as a pivotal component in this paradigm shift. Personalized treatments are also gaining prominence because they offer the potential for improved efficacy and reduced side effects. Unlike traditional chemotherapy, which affects both cancerous and healthy cells, targeted therapies selectively attack cancer cells while sparing normal tissue, minimizing collateral damage and adverse reactions.

As personalized treatments become the standard of care, the demand for targeted cancer therapy is expected to rise. This shift represents a significant step forward in cancer care, offering patients the promise of more effective, less toxic treatments tailored to their unique cancer profiles, and ultimately leading to improved patient outcomes and a brighter future in the battle against cancer.

Segmental Insights

Therapy Type Insights

Based on the therapy type segment, the monoclonal antibodies segment emerged as the leader in revenue generation. These highly targeted and specific antibodies have revolutionized cancer treatment, offering unparalleled effectiveness against various types of cancer. Unlike traditional chemotherapy, monoclonal antibodies provide a safer alternative with lower toxicity and minimal side effects, greatly enhancing the quality of life for patients. The remarkable growth of this segment can be attributed to its ability to not only ensure effective cancer treatment but also improve overall patient well-being.

Continued research and development in this field hold immense potential for further advancements and breakthroughs in monoclonal antibody therapy. This brings new hope and optimism to cancer patients worldwide, as they can look forward to more personalized and targeted treatment options. With each passing day, the horizon of possibilities expands, promising a brighter future in the fight against cancer.

Disease Indication Insights

Based on disease indication, breast cancer segment is expected to dominate the market over the forecast period, primarily due to its high prevalence and impactful nature. According to the latest data provided by the World Health Organization (WHO) in February 2022, breast cancer emerged as the most commonly diagnosed cancer worldwide in 2020, accounting for approximately 2.26 million cases globally. This alarming statistic underscores the urgent need for effective prevention strategies, early detection methods, and advanced treatment options to combat this devastating disease. By implementing comprehensive screening programs, raising awareness about risk factors, and investing in innovative research, we can strive to improve patient outcomes and reduce the burden of breast cancer on a global scale. Together, let us work towards a future where every individual affected by breast cancer receives timely and personalized care, leading to better overall health and well-being.

Regional Insights

Based on regional analysis, the North America segment accounted for the largest revenue share in 2020 and is projected to maintain its dominance throughout the forecast period. This can be attributed to the rapid growth of the biologics industry in North America, which has seen a surge in the number of biotechnology companies

contributing exponentially to market expansion. Additionally, the region's robust biopharmaceutical production facilities have been supported by increased investments and government initiatives, further fueling the growth of the Targeted Cancer Therapy Market in North America.

In contrast, the Asia Pacific region is expected to emerge as the most opportunistic market during the forecast period. This can be attributed to several factors, including rising consumer awareness regarding the availability of targeted therapeutics, an increasing prevalence of cancer and other chronic diseases, a steady increase in disposable income, growing popularity of health insurance, and the rapid growth of healthcare infrastructure. Moreover, consumers in the region have gained confidence in the safety and effectiveness of targeted therapeutics, as it has demonstrated the ability to inhibit the expansion of cancer cells without damaging normal cells, thereby reducing the risk of side effects associated with cancer treatment. These favorable factors are anticipated to drive significant market growth in the Asia Pacific region throughout the forecast period.

Key Market Players

Amgen Inc.

AstraZeneca plc

Bayer AG

Bristol-Myers Squibb Company

F. Hoffmann-La Roche Ltd

GlaxoSmithKline plc

Johnson & Johnson

Merck & Co. Inc.

Novartis AG

Pfizer Inc.

Report Scope:

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

Targeted Cancer Therapy Market, By Therapy Type:

- Hormone Therapies
- Monoclonal Antibodies
- Signal Transduction Inhibitors
- Gene Expression Modulators
- Apoptosis Inhibitors
- Others

Targeted Cancer Therapy Market, By Disease Indication:

- Lung Cancer
- Breast Cancer
- Colorectal Cancer
- Leukemia
- Melanoma
- Lymphoma
- Others

Targeted Cancer Therapy Market, By End User:

- Hospitals & Clinics

Cancer & Radiation Therapy Centers

Academic & Research Institutions

Targeted Cancer Therapy Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Targeted Cancer Therapy Market.

Available Customizations:

Global Targeted Cancer 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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