

Europe Colorectal Cancer Treatment Market Size and Forecast (2021 - 2031)

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Abstracts

The Europe colorectal cancer treatment market is projected to grow significantly, reaching an estimated US\$ 6,501.1 million by 2031, up from US\$ 5,280.9 million in 2024, reflecting a compound annual growth rate (CAGR) of 3.0% from 2025 to 2031. This growth is driven by a high disease burden, demographic changes, evolving clinical practices, and disparities in healthcare access across various European countries.

Colorectal cancer (CRC) is a major public health concern in Europe, being one of the most prevalent cancers and a leading cause of cancer-related deaths. Men are disproportionately affected, with CRC accounting for approximately 11.6% of all cancer deaths in the European Union (EU). According to GLOBOCAN 2022, Europe reported around 538,532 new CRC cases and 244,824 deaths, making it the second most common cancer diagnosis in the region.

Screening is a crucial strategy in combating CRC, with many Western and Northern European countries implementing organized screening programs for individuals aged 50 to 74. The fecal immunochemical test (FIT) is the most widely used screening method, followed by colonoscopy for positive results. Countries like Austria, the Czech Republic, and Germany have seen significant reductions in CRC incidence due to these programs, while nations without large-scale screening, such as Bulgaria and Estonia, have experienced rising incidence rates.

Surgical resection remains the primary treatment for early-stage CRC, with a growing trend towards minimally invasive techniques in well-resourced healthcare systems. The adoption of laparoscopic and robotic surgeries is increasing, providing benefits such as quicker recovery times. However, access to these advanced procedures can vary significantly based on a country's healthcare infrastructure and funding.

Recent advancements in systemic therapies emphasize personalized medicine, with the European Medicines Agency (EMA) playing a pivotal role in drug approvals. A notable development is the approval of fruquintinib (FRUZAQLA) in June 2024, a targeted therapy for previously treated metastatic CRC, marking a significant milestone in treatment options for this patient group.

Research and development efforts in Europe are focusing on innovative approaches, including targeted therapies for specific mutations and non-invasive liquid biopsies for disease monitoring. The EU's "Beating Cancer Plan" aims to address care inequalities and promote prevention, early diagnosis, and access to innovative treatments, demonstrating a commitment to improving patient outcomes across the region.

The market segmentation for colorectal cancer treatment in Europe includes various categories. By treatment type, the market is divided into Surgery, Chemotherapy, Immunotherapy, Targeted Therapy, and Others, with Surgery being the dominant segment in 2024. Age-wise, the market is segmented into Below 49 Years, 50 - 64 Years, and Above 65 Years, with the latter group holding the largest share. In terms of end users, Hospitals, Specialty Clinics, and Home Care are the primary segments, with Hospitals leading the market.

The regulatory landscape is evolving, with bodies like the EMA and the UK's MHRA facilitating access to novel therapies through initiatives such as the Cancer Medicines Pathfinder. This regulatory support is expected to enhance the pipeline of innovative treatments, including targeted agents and immunotherapy regimens, thereby improving patient access to precision medicine.

Country-wise, Germany is the largest market for colorectal cancer treatment in Europe, driven by a significant disease burden and advancements in clinical care. CRC represents about 11-12% of all new cancer cases in Germany, with around 33,000 new cases diagnosed annually. The country has seen a decline in CRC incidence and mortality rates over the past two decades, attributed to improved screening and treatment options. The five-year survival rate has also improved significantly, now estimated at 70-75%.

Germany's treatment protocols align with global standards, utilizing colonoscopy-guided polypectomy or surgery for early-stage disease, and adjuvant chemotherapy and biologics for metastatic cases. The country is also innovating in early detection methods, such as smartphone-based FIT tests, which have shown promising results in

increasing screening uptake.

Emerging therapies, including combinations of existing treatments and novel immunotherapeutic approaches, are being explored in clinical trials. The German market is characterized by a robust research and development ecosystem, with numerous clinical trials and a focus on pharmaceutical innovation.

Key players in the Europe colorectal cancer treatment market include Bayer AG, Pfizer Inc., Teva Pharmaceutical Industries Ltd., Bristol-Myers Squibb Co., Genentech Inc., Takeda Pharmaceutical Co. Ltd., Amgen Inc., Regeneron Pharmaceuticals Inc., Eli Lilly and Co., and Otsuka Holdings Co. Ltd. These companies are pursuing various strategies, including product innovation and mergers and acquisitions, to enhance their market presence and offer innovative solutions to patients.

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