

South & Central America Cancer Drugs Market Size and Forecast (2021 - 2031)

<https://marketpublishers.com/r/S8E0D7DC683CEN.html>

Date: April 2026

Pages: 270

Price: US\$ 3,450.00 (Single User License)

ID: S8E0D7DC683CEN

Abstracts

The South and Central America Cancer Drugs Market is projected to grow significantly, reaching an estimated US\$ 23,889.6 million by 2031, up from US\$ 11,271.4 million in 2024. This growth represents a compound annual growth rate (CAGR) of 11.4% from 2025 to 2031.

Executive Summary and Market Analysis

The cancer drugs market in South and Central America is primarily segmented into key countries: Brazil, Argentina, Peru, Chile, Colombia, and the Rest of South & Central America. Brazil and Argentina are at the forefront of this market, driven by a burgeoning demand for cancer treatments, which is fueled by the expansion of local biopharmaceutical companies and an increase in clinical trial activities. The region is witnessing a notable rise in the demand for innovative cancer therapies, including biologics, targeted therapies, and immunotherapies.

Despite the growing demand, challenges such as affordability and access to newer therapies persist. The Pan American Health Organization (PAHO) is actively working to enhance access to essential cancer medications by providing them at reduced costs. Additionally, the aging population and increased awareness and diagnosis of cancer are contributing to the rising demand for effective treatments. The market dynamics are also being reshaped by the adoption of advanced therapies, including biomarker-driven targeted treatments, immune checkpoint inhibitors, CAR-T cell therapies, and biosimilars.

The South and Central America cancer drugs market is poised for substantial growth, supported by local production initiatives and international partnerships. A notable

example is Novo Holdings' acquisition of the US-based contract drug manufacturing company Catalent in February 2024. Catalent operates in several Latin American countries, including Argentina and Brazil, and this acquisition is expected to enhance Novo Holdings' manufacturing capabilities and expand its global presence.

Strategic Insights

Market Segmentation Analysis

The South and Central America cancer drugs market can be segmented based on therapy types, indications, and distribution channels:

By Therapy Types: The market is divided into Chemotherapy, Targeted Therapy, Immunotherapy, Hormonal Therapy, and Other Therapy Types. In 2024, the Targeted Therapy segment emerged as the market leader.

By Indications: The market is categorized into Blood Cancer, Lung Cancer, Breast Cancer, Colorectal Cancer, Prostate Cancer, Stomach Cancer, Cervical Cancer, Liver and Intrahepatic Bile Ducts Cancer, Thyroid Cancer, and Other Indications. The Other Indications segment was the largest in 2024.

By Distribution Channel: The market is segmented into Hospital Pharmacies, Retail Pharmacies, and Online Stores, with Hospital Pharmacies dominating the market in 2024.

Market Outlook

Governments in the region are increasingly recognizing the critical need for a robust cancer treatment landscape and are implementing policies aimed at improving access to effective therapies. There has been a notable increase in funding from both government and private sectors for research and development in cancer treatments, leading to the emergence of innovative drugs and therapies.

To strengthen oncology care and drug development, governments are ramping up funding, policy support, and infrastructure expansion. This proactive approach is unlocking new opportunities within the cancer drugs market. By implementing patient-friendly reimbursement policies and healthcare initiatives, government bodies are making cancer treatments more accessible, ensuring satisfactory cost coverage for

cancer therapeutics. With enhanced funding and resource availability, healthcare providers can offer a broader range of treatment options, ultimately improving patient outcomes and maintaining competitiveness in the market. The increased support from both governmental and private organizations for the development and utilization of cancer therapeutics is fostering innovation, creating significant growth opportunities in the cancer drugs sector.

Country Insights

The South and Central America cancer drugs market is further analyzed by country, focusing on Brazil, Argentina, and the Rest of South and Central America. Brazil holds the largest market share as of 2024.

Cancer is a prevalent chronic disease among the aging population in Brazil. According to PAHO, the number of individuals aged 60 and above in Brazil is projected to rise from 30 million in 2022 (13% of the total population) to 50 million by 2030 (24% of the total population). This demographic shift is contributing to an increase in cancer incidence, particularly for common types such as breast, prostate, and lung cancers. The demand for effective cancer treatments is surging as the median age of the population continues to rise. GLOBOCAN 2020 reported approximately 592,212 cancer cases in Brazil, with breast cancer being one of the most prevalent types. The Brazilian National Cancer Institute (INCA) estimates that around 66,200 new cases of breast cancer are diagnosed annually in the country. Furthermore, colorectal cancer incidence is notably higher among older adults, with approximately 55,102 new cases reported in 2020.

Company Profiles

Key players in the South and Central America cancer drugs market include F. Hoffmann-La Roche Ltd, Pfizer Inc, Novartis AG, Bristol-Myers Squibb Co, Johnson & Johnson, AstraZeneca Plc, Astellas Pharma Inc, AbbVie Inc, Merck KGaA, and Eli Lilly and Co. These companies are employing various strategies, including expansion, product innovation, and mergers and acquisitions, to deliver innovative products to consumers and enhance their market share.

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