

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

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Abstracts

The South & Central America colorectal cancer treatment market is projected to grow significantly, reaching an estimated US\$ 1,557.8 million by 2031, up from US\$ 1,288.8 million in 2024, reflecting a compound annual growth rate (CAGR) of 2.8% from 2025 to 2031. This market encompasses several countries, including Brazil, Argentina, Peru, Chile, Colombia, and others in the region, with Brazil and Argentina leading in demand for cancer therapies due to local biopharmaceutical advancements and increased clinical trial activities.

The colorectal cancer (CRC) treatment landscape in South America is under pressure from rising incidence and mortality rates, which are surpassing global averages. Alarming, approximately 60% of CRC patients in the region succumb to the disease, compared to about 30% in the United States. This stark difference is largely due to late-stage diagnoses, limited access to advanced treatments, and socioeconomic disparities that hinder effective healthcare delivery.

Screening programs, which are crucial for early detection, are not comprehensive in South America. While countries with higher Human Development Index (HDI) scores, such as Argentina, Uruguay, and Brazil, have initiated some screening efforts, the overall coverage remains inadequate. Factors such as limited resources, low public awareness, and insufficient healthcare infrastructure, especially in rural and low-income areas, contribute to this challenge.

The standard of care for CRC varies significantly across the region, often reflecting the nature of the national healthcare system—whether it is publicly funded, privately insured, or a combination of both. Surgical resection is the primary treatment for early-stage CRC, but access to advanced surgical techniques is often restricted to urban centers.

For advanced cases, cytotoxic chemotherapy remains the cornerstone of treatment.

Recent advancements in molecular profiling and targeted therapies are transforming the treatment landscape. Biomarker testing for mutations like RAS, BRAF, and microsatellite instability (MSI-H) is becoming more prevalent, particularly in private hospitals and countries with better healthcare systems. These tests are essential for guiding treatment decisions, such as the use of anti-EGFR inhibitors like cetuximab and panitumumab for patients with RAS wild-type tumors. However, access to these therapies often depends on a patient's financial situation or insurance coverage, highlighting significant disparities in treatment access.

Immunotherapy is emerging as a promising area in the CRC market, particularly for patients with MSI-H or dMMR tumors. While immune checkpoint inhibitors such as nivolumab and pembrolizumab are becoming more available, their high costs and the necessity for specific biomarker testing limit accessibility. In many cases, patients can only access these treatments through clinical trials or by paying out-of-pocket, which is not feasible for most.

Despite these challenges, there are ongoing efforts to enhance CRC care in the region. Researchers are actively engaged in clinical trials to better understand the local epidemiology of CRC and to develop cost-effective treatment solutions. For instance, studies in Peru have emphasized the importance of treatment adherence in improving survival rates, highlighting the need for patient education and support systems to enhance long-term outcomes.

The market segmentation for colorectal cancer treatment includes categories such as Surgery, Chemotherapy, Immunotherapy, Targeted Therapy, and others. In 2024, the Surgery segment was the largest, while the age group segment showed that individuals above 65 years dominated the market. Hospitals were the primary end-users of CRC treatments in the same year.

Brazil, in particular, is experiencing a significant burden from colorectal cancer, with the Brazilian National Cancer Institute (INCA) estimating around 45,000 new cases annually. The incidence rate is approximately 11.43 cases per 100,000 inhabitants, with higher rates in the South and Southeast regions. The mortality rate is also expected to rise, driven by an aging population and socioeconomic disparities.

Public health initiatives in Brazil, such as National Cancer Awareness Day and the Blue

March campaign, aim to raise awareness about CRC prevention and early detection. However, systemic issues like uneven screening program expansion and underfunding hinder progress. Addressing these barriers is crucial for improving early diagnosis and reducing mortality rates.

Key players in the South & Central America 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, to enhance their market presence.

In summary, the South & Central America colorectal cancer treatment market is poised for growth, driven by advancements in targeted therapies and immunotherapy, despite significant challenges related to healthcare access and socioeconomic disparities.

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