

## **Cancer Monoclonal Antibodies Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 115 pages | Mordor Intelligence

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### **Report description:**

The cancer monoclonal antibodies market is expected to witness a CAGR of 9.2% during the forecast period (2022-2027).

The COVID-19 pandemic is an unprecedented health concern that is impacting the tumor ablation market. For instance, a study titled 'Impact of the COVID-19 Pandemic on Cancer Care: A Global Collaborative Study' in 2020 reported that A total of 356 centers from 54 countries across six continents participated between April 21 and May 8, 2020. These centers serve 716,979 new patients with cancer a year. Most of them (88.2%) reported facing challenges in delivering care during the pandemic. Although 55.34% reduced services as part of a preemptive strategy, other common reasons included an overwhelmed system (19.94%), lack of personal protective equipment (19.10%), staff shortage (17.98%), and restricted access to medications (9.83%). In the study "Monoclonal antibodies and cancer treatment: What to know" published in November 2020, cancer isn't the only disease treated with monoclonal antibodies. Antibody targets on the coronavirus have also been identified. Monoclonal antibodies help shorten the time of severe illness by preventing the infected cells from multiplying. Thus, expanded application of monoclonal antibodies in COVID-19, the studied market had been significantly impacted by COVID-19.

Certain factors that are driving the market growth include the growing prevalence of cancer, increasing investment in R&D of genomic studies, and rising advancements in and preference toward the specificity of monoclonal antibodies to target cancer. Furthermore, the increasing cancer burden due to several factors such as population growth and aging, and the changing prevalence of certain causes of cancer are linked to social and economic development. For instance, as per the World Health Organization (WHO) in February 2022, in terms of new cases of cancer, the most common cancer in 2020 were: breast (2.26 million cases); lung (2.21 million cases); colon and rectum (1.93 million cases); prostate (1.41 million cases); skin (non-melanoma) (1.20 million cases); and stomach (1.09 million cases).

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In addition, as per the 2020 statistics by GLOBOCAN 2020, an estimated 19,292,789 people were diagnosed with cancer in 2020. As per the same source mentioned above, the number of people suffering from cancer is estimated to reach 30.2 million by 2040. Thus, the increased use of monoclonal antibodies for the treatment of cancer is driving this market.

Moreover, strategic market initiatives by market players will also lead to significant growth of the market. In February 2022, HaemaLogiX Ltd (HaemaLogiX) and Lonza agreed to manufacture the next clinical batch (cGMP) of HaemaLogiX's lead multiple myeloma drug candidate, KappaMab, a monoclonal antibody that binds to a cell surface target called kappa myeloma antigen (KMA) that is only found on myeloma cancer cells and not on normal plasma cells.

However, following the regulatory guidelines for monoclonal antibodies related to cancer is a highly rigorous process in most regions, globally. Thus, may impact the growth of the market over the forecast period.

#### Cancer Monoclonal Antibodies Market Trends

##### Trastuzumab (Herceptin) is Expected to Hold Significant Market Share in Monoclonal Antibody Therapies

Trastuzumab (Herceptin) is a monoclonal antibody used to treat breast cancer. It is also an approved first-line treatment for HER2+ metastatic cancer of the stomach or gastro-esophageal junction. The country witnessed continued growth, mainly, due to the longer duration of treatment in combination with Perjeta. The high prevalence of cancer globally will drive the studied segment growth. For instance, according to World Health Organization (WHO) update in March 2021, in 2020, there were 2.3 million women diagnosed with breast cancer globally. As of the end of 2020, there were 7.8 million women alive who were diagnosed with breast cancer in the past 5 years, making it the world's most prevalent cancer. Thus, the high prevalence of breast cancer will boost the demand for Herceptin monoclonal antibodies for treating it, thereby boosting the market.

The approval of products in the studied segment is expected to drive market growth. For instance, in January 2021, the antibody-drug conjugate trastuzumab deruxtecan has been granted conditional approval in the European Union for use as a single agent in the treatment of adult patients with unresectable or metastatic HER2-positive breast cancer who have previously received 2 or more HER2-based regimens. Additionally, in May 2021, the United States Food and Drug Administration granted accelerated approval to pembrolizumab (Keytruda, Merck & Co.) in combination with trastuzumab, fluoropyrimidine- and platinum-containing chemotherapy for the first-line treatment of patients with locally advanced unresectable or metastatic HER2 positive gastric or gastroesophageal junction (GEJ) adenocarcinoma.

Thus, owing to the abovementioned factors, the market segment is expected to propel the growth of the market.

##### North America is Expected to Hold a Significant Share in the Market and Expected to do Same in the Forecast Period

The market is growing at a strong pace in North America. The pharmaceutical and biotechnology firms have gained abundant knowledge and expertise in cancer monoclonal antibodies.

According to the estimates of the 2022 American Cancer Society, Inc., about 236,740 new cases of lung cancer will be diagnosed in the country in 2022. The same source also states that 79,000 new cases of kidney cancer will be reported in 2022 from Kidney cancer. The high burden of cancer is expected to boost the demand for ablation devices, thereby driving the market growth.

Additionally, product approvals in the region will further drive market growth. For instance, In July 2021, Merck received United States Food and Drug Administration (FDA) for KEYTRUDA, Merck's anti-PD-1 therapy, for the treatment of patients with high-risk early-stage triple-negative breast cancer (TNBC) in combination with chemotherapy as neoadjuvant treatment and then continued as a single agent as adjuvant treatment after surgery, based on Phase 3 KEYNOTE-522 trial. In December 2020, MacroGenics, Inc.

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received United States Food and Drug Administration (FDA) approval for MARGENZA, in combination with chemotherapy, for the treatment of adult patients with metastatic HER2-positive breast cancer who have received two or more prior anti-HER2 regimens, at least one of which was for metastatic disease.

Moreover, depending on the high percentage of molecules that are in the pipeline, this scenario may change. Human monoclonal antibody (mAb) is the fastest-growing category in the market. Additionally, with the trend toward developing targeted therapeutics, the focus on fully-humanized cancer monoclonal antibodies is expected to increase, owing to the perceived low level of immunogenicity of these agents. Thus, due to the above-mentioned factors, the studied market is expected to grow during the study period.

#### Cancer Monoclonal Antibodies Market Competitor Analysis

The cancer monoclonal antibodies market is highly consolidated. Some of the companies which are currently dominating the market are Amgen Inc., Bristol Myers Squibb Company, Eli Lilly and Company, F. Hoffmann-La Roche AG, Genmab AS, GlaxoSmithKline PLC, Johnson & Johnson, Novartis AG, Seattle Genetics Inc., and Spectrum Pharmaceuticals Inc., among others, hold the substantial market share in the market studied.

#### Additional Benefits:

The market estimate (ME) sheet in Excel format  
3 months of analyst support

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