

Cancer Supportive Care Drugs Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The cancer supportive care drugs market is expected to register a CAGR of nearly 3.56% during the forecast period (2022-2027).

The COVID-19 pandemic affected healthcare systems and resulted in the interruption of usual care in many healthcare facilities, exposing vulnerable patients with cancer to significant risks. For Instance, in August 2020 the Authorea Journal article titled 'The Impact of COVID-19 Pandemic In Children With Cancer: A Report From Saudi Arabia' reported that cancer children on chemotherapy require regular outpatient assistance, and intermittent hospital admission, and support therapy for appropriate therapy delivery. It reported that in the studied population, 63% of patients reported a delay in treatment received during the COVID-19 pandemic. Also, out of these, the majority of patients (53.3%) reported hospital cancellation as the main reason for treatment or procedure delay during the COVID-19 lockdown and city curfew and 30.8% of patients reported non -availability of adequate PPE, lack of cancer support and shortage of medications as a major challenge faced during the pandemic. Many countries have suspended cancer screening programs for asymptomatic people due to the need to deploy healthcare personnel and resources to combat the pandemic. The Welsh and Scottish governments terminated breast, cervical, and bowel cancer screening programs in March 2020. Thus, owing to the shifted focus of research towards the development of COVID-19 vaccines, the market initially suffered a negative impact in terms of clinical trial activity but later came to recover.

Factors such as the increasing prevalence of cancer can be directly associated with the growth of this market. According to the American Cancer Society, in 2021 the estimated new numbers of cancer cases were 1.9 million and 608,570 cancer deaths in the United States. And in 2022 the same source projected that the new number of cancer cases will be 1.9 million and 609,360 cancer deaths in the United States. According to GLOBOCAN 2021, the new cancer cases that were diagnosed accounted for 19.3 million in 2021 globally, with 10.0 million deaths due to cancer. According to the WHO-World Health Organization, Cancer is the largest cause of mortality worldwide, accounting for almost 10 million fatalities in 2020, or nearly one in every six deaths, and

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approximately 400 000 children are diagnosed with the disease. Thus, increasing cancer would increase the demand for supportive drugs for treatment.

Rising disposable income and improved healthcare structure have also helped people to access cancer supportive care drugs, which is also helping this market grow. As per an August 2021 update, in Singapore, MediShield Life coverage changed from USD 3,000 a month to a range of USD 200 to USD 9,600 a month, based on the drugs used. The Government will also subsidize more cancer treatments and raise the criteria from a per capita monthly income of USD 2,800 to USD 6,500 for subsidies under the Medication Assistance Fund for certain high-cost drugs. The market players joining the patient access programs are boosting the growth of the market. For Instance, in February 2021, Biocon Biologics Ltd. signed an agreement with the Clinton Health Access Initiative (CHAI) to expand access to lifesaving cancer biosimilars in over 30 countries in Africa and Asia as a part of the Cancer Access Partnership (CAP). The partnership is a significant step in delivering advanced cancer therapies to patients who need them the most and ensuring equitable access to high-quality biosimilars in low- and middle-income countries (LMICs). Through this partnership, the company will enable access to Trastuzumab & Pegfilgrastim in Africa & Asia. The launch of new drugs by the market players in the regions is also boosting the growth of the market. For instance, in September 2021, Intas Pharmaceuticals launched Oral Azacitidine in India under the brand name Azadine-O for Acute Myeloid Leukemia. It is approved for use in maintenance therapy for adult patients with Acute Myeloid Leukaemia. Such launches enhance the accessibility of cancer-supportive drugs and thus boosts the growth of the market segment.

However, other factors such as side effects from cancer-supportive drugs and stringent regulatory processes have also contributed as restraining factors to this market.

Cancer Supportive Care Drugs Market Trends

NSAIDs (Non-Steroidal Anti-Inflammatory Drugs) Segment is Expected to Register High Growth Over the Forecast Period

Various research studies have been published on the insights about the Non-Steroidal Anti-Inflammatory Drugs (NSAIDs) in cancer treatments. For instance, in February 2021, a research study published titled "Non-Steroidal Anti-Inflammatory Drugs in Colorectal Cancer Chemoprevention" stated that there is growing evidence from epidemiologic, preclinical, and clinical studies suggesting that non-steroidal anti-inflammatory drugs (NSAIDs) play a beneficial role in colorectal cancer chemoprevention. They reduce the risk of colorectal polyps, mostly by cyclooxygenase-2 inhibition. Further, according to a research study published in November 2021, titled "Nonsteroidal Anti-Inflammatory Drugs Reduce Second Cancer Risk in Patients with Breast Cancer: A Nationwide Population-Based Propensity Score-Matched Cohort Study in Taiwan", the use of COX-2 together with non-COX-2 medications during the follow-up could reduce second cancer risk, taking more than one NSAID had varying benefits on reducing the incidence of second cancer. Hence, such research studies increase awareness about the drugs and will increase the market growth.

The launch of new drugs by the market players in the regions is also boosting the growth of the market. For instance, in September 2021, Intas Pharmaceuticals launched Oral Azacitidine in India under the brand name Azadine-O for Acute Myeloid Leukemia. It is approved for use in maintenance therapy for adult patients with Acute Myeloid Leukaemia. Such launches enhance the accessibility of the drugs and thus boosts the growth of the market segment. Additionally, in July 2020, National Pharmaceutical Regulatory Authority, Malaysia approved a new breast cancer drug named NERLYNX (neratinib). It has shown its significance in reducing the risk of cancer recurrence. The drug is an oral medication taken by women with breast cancer who have had surgery, chemotherapy, and prior trastuzumab-based therapy. Thus, owing to the abovementioned factors, the segment of the studied market is expected to project growth over the forecast period.

North America is Expected to Dominate the Market Over the Forecast Period

North America is expected to hold a major market share in the global brucellosis vaccines market. Factors such as the increasing

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prevalence of diseases and increasing initiatives by the public and private players are anticipated to drive the studied market growth in the country. Although high prevalence leads to a burden on the population of the country, US and Canada have developed healthcare systems and hence spend a lot on the treatment and research in the oncology field. Hence, these countries attract a lot of market players. The increasing research and development funding over the years is also boosting the growth of the market. In April 2022, a study published in Proceedings of the National Academies of Sciences conducted by researchers from NYU Grossman School of Medicine revolves around the dense protein meshwork that supports organs and helps to rebuild damaged tissue. Collagen protein fibers, the major component of the mesh, are continually broken down and replaced to maintain tensile strength, and as part of the wound healing process. The study found that the degraded collagen increased the amount of arginine, an amino acid that is used by the enzyme nitric oxide synthase (iNOS) to produce compounds called reactive nitrogen species (RNS). This, in turn, caused neighboring, supportive stellate cells to build collagen-based meshes around tumors. Such studies would provide new innovative methods for the use of supportive drugs in the treatment of cancer which will increase the market growth.

Furthermore, in January 2020, the Global Cancer Program hosted the "UCSF-Mexico Cancer Collaboration Annual Meeting" with partners, such as Instituto Nacional Cancerologia (INCan), Instituto Nacional de Salud Publica (INSP), and the Instituto Nacional de Medicina Genomica (INMEGEN). The UCSF-Mexico Cancer Initiative aims to strengthen regional cancer research capacity and expand the institutional cancer research portfolios and training activities of partners in Mexico. Thus, the high prevalence and growing research funding for cancer research is expected to drive the growth of the cancer vaccines market in Mexico. Hence, increasing research would increase the market growth in the upcoming period by providing a favorable environment for supportive drug development. Therefore, the prevalence of diseases and increasing initiatives by the public and private players are anticipated to drive the studied market growth in the country.

Cancer Supportive Care Drugs Market Competitor Analysis

The majority of the cancer supportive care drugs are being manufactured by the global key players. Market leaders with more funds for research and a better distribution system have established their position in the market. The market is partially fragmented making it very competitive. Moreover, Asia-Pacific is witnessing an emergence of some small players, which has helped the market growth in these regions and has also increased competition for market share. Some of the companies which are currently dominating the market are Amgen Inc., Novartis AG, Merck & Co. Inc, F. Hoffmann-La Roche AG, and Johnson & Johnson among others.

Additional Benefits:

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

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