

Cutaneous T-Cell Lymphoma Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Cutaneous T-cell Lymphoma Market is expected to witness a CAGR of 1.8% over the forecast period, 2022-2027.

As most elective treatments were deferred due to the outbreak of the COVID-19 pandemic, the cutaneous T-cell lymphoma (CTCL) market was also significantly impacted. However, delayed treatment was not recommended for severe diseases such as cancer. Thus, necessary guidelines and measures were put forth to allow cutaneous T-cell lymphoma (CTCL) treatments amid the pandemic with all protective measures. The research article titled "Cutaneous T-cell lymphoma (CTCL) exacerbation after viral vector COVID-19 vaccination" published in October 2021 concluded that the reported cases suggest that disease flare-ups may be associated with overproduction and exhaustion of CD4+/CD8+ T cells expressing CD30 after stimulation by the adenovirus. Thus, the chances of increased progression of cutaneous T-cell lymphoma post-COVID-19 were high. Therefore, the COVID-19 pandemic created the need for better care and treatment options for CTCL patients and hence has had a significant impact on the growth of the market.

The factors driving the market growth majorly include the growing burden of lymphoma cases coupled with the increasing geriatric population. Additionally, the fast approval of procedures by regulatory authorities and increasing clinical studies are also contributing to the growth of the market.

The launch of products and the support of the regulatory bodies for the fast approval of drugs in many countries are also propelling the growth of the market. For instance, in May 2021, Soligenix was awarded an "Innovation Passport" for HyBryte (hypericin) for the treatment of early-stage cutaneous T-cell lymphoma (CTCL) in adults under the United Kingdom's (UK's) Innovative Licensing and Access Pathway (ILAP).

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Additionally, the increasing number of clinical trials focusing on new drugs and treatments for the disease may boost the growth of the market in the future. For instance, as per clinicaltrials.gov, the research study titled "A Phase I Study With an Expansion Cohort of Duvelisib and Nivolumab in Mycosis Fungoides (MF) and Sezary Syndrome (SS)" was sponsored by the National Cancer Institute, started in May 2021, and is expected to be completed by May 2025. The trial's objective is to determine whether intra-patient fluctuations in serum cytokine levels can be used to predict whether duvelisib and nivolumab work against cutaneous T-cell lymphoma. The positive results from such studies could lead to the entrance of new drugs or effective treatments into the market, which is expected to boost the growth of the market over the forecast period.

Thus, owing to the abovementioned factors, the market is expected to show growth over the forecast period. However, the high cost of treatment may hinder the growth of the market.

Cutaneous T-cell Lymphoma Market Trends

Mycosis Fungoides Segment is Expected to Register a Significant Growth in the Forecast Years

Mycosis fungoides (MF) is the most frequent type of cutaneous T-cell lymphoma, which usually involves the skin and grows slowly over many years. It isn't easy to diagnose, especially in the early stages. MF is more common in men compared to women, in blacks compared to whites, and in the elderly population compared to younger people.

According to the article titled "Mycosis Fungoides" published by StatPearls in April 2022, Mycosis fungoides have an incidence of around 6 cases per million per year in Europe and the United States. This accounts for 4% of all non-Hodgkin's lymphoma cases. The same source also reported that it is more common in adults over 50 years of age, with a male-to-female ratio of between 1.6 and 2. Additionally, the article further detailed that the disease is more common among blacks than Caucasians or Asians. Thus, the high prevalence of mycosis fungoides is expected to boost segment growth.

Furthermore, regulatory organizations such as the United States Food and Drug Administration and the European Medicines Agency have given special designations to most medications developed for mycosis fungoides. Many of these drugs have been given particular classifications, such as orphan drugs and breakthrough therapy. For instance, in June 2020, Kyowa Kirin, a Japan-based drug maker, launched Poteligeo in Europe. It would be able to treat patients with Sezary syndrome, mycosis fungoides, and rare cancers.

Thus, all the factors mentioned above, such as the rising prevalence of mycosis fungoides and product launches, will boost the segment's growth over the coming years.

North America dominates the Cutaneous T- cell Lymphoma Market

North America dominated the market owing to the increased demand for advanced treatment options and early adoption of new technologies. According to the American Cancer Society's 2022 statistics, there will be an estimated 80,470 new cases of non-Hodgkins lymphoma and 89,010 cases of lymphoma in 2022 in the United States. Another source from the same organization reported that T-cell lymphomas make up less than 15% of non-Hodgkin's lymphomas in the United States, while cutaneous T-cell lymphomas account for nearly 5% of all lymphomas. Such a high burden of the disease creates the need for treatment and thus propels the growth of the market in the region.

Some major companies operating in the North American oncology sector are adopting several strategies, such as collaboration and acquisition, to strengthen their positions in the cutaneous T-cell lymphoma market. For instance, in August 2020, BostonGene Corporation entered into a partnership with the Weinstock Laboratory, which is at Dana-Farber Cancer Institute Inc. The collaboration is focused on defining predictors of response to PI3 kinase inhibition in relapsed/refractory T-cell lymphomas.

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In addition, other companies, such as Amgen and Merck, have been working on developing cancer therapies for T-cell lymphomas. Additionally, in September 2021, Soligenix Inc. reported that the Office of Orphan Products Development of the United States Food and Drug Administration (FDA) had granted orphan drug designation to the active ingredient hypericin for treating T-cell lymphoma, extending the target population beyond cutaneous T-cell lymphoma (CTCL).

Thus, owing to the abovementioned factors, the North American region is expected to show growth over the forecast period.

Cutaneous T-cell Lymphoma Market Competitor Analysis

The market studied is moderately competitive and consists of several major players. Some of the key players in the cutaneous T-cell lymphoma market include Bausch Health Companies Inc., Celgene Corporation, Helsinn Healthcare SA, Kyowa Hakko Kirin Co., Ltd., Merck & Co. Inc., Seattle Genetics, and Soligenix, Inc., which have a presence internationally and provide these products across the globe.

Additional Benefits:

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

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