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Oncology Based In-Vivo Cro Market - Growth, Trends, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 120 pages | Mordor Intelligence

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Report description:

The Oncology Based In-Vivo CRO Market is anticipated to register a CAGR of 7.3% during the forecast period.

The COVID-19 pandemic has affected the healthcare systems globally and also has had a significant impact on the Oncology Based In-Vivo CRO Market. However, initiatives such as grant approval for vaccine production are expected to increase the market growth. For instance, in September 2022, the Gastro-Intestinal Research Foundation (GIRF) in Chicago granted Elicio Therapeutics a USD 2.8 million grant to fund research for two therapeutic cancer vaccines. ELI-007 is being developed to target BRAF gene mutations, whereas ELI-008 is being designed to target p53 hotspot mutations in solid tumors such as colorectal cancer, melanoma, and non-small cell lung cancer (NSCLC). Thus, the COVID-19 pandemic has impacted the oncology-based In-Vivo CRO market. However, the initiatives by key market players are expected to increase market growth during the forecast period.

The factors driving the market growth include increasing patient assistance programs (PAPs), increasing government initiatives for cancer awareness, the rising prevalence of cancer worldwide, vital R&D initiatives from key players, and the increasing demand for personalized medicine. According to the Globocan 2021 fact sheet, an estimated 19,292,789 new cancer cases were diagnosed worldwide, with nearly 9,958,133 deaths from cancer globally. According to estimates from the International Agency for Research on Cancer (IARC), by 2040, the global burden of cancers is expected to grow to 27.5 million new cancer cases and 16.3 million deaths worldwide. The high disease burden fuels the demand for outsourcing R&D activities for effective drug development/treatment. Thus, the increasing incidence of cancer cases is expected to drive the need for advanced cancer therapies to treat patients effectively. The dendritic cell (DC) vaccine can be achieved by the in vitro culture of DC (patient's autologous dendritic cell) and tumor-associated antigen. The low toxicity of DC vaccines in clinical trials makes it possible to use optimistic predictions of their applicability in broader clinical practice, thereby increasing their adaptability. For instance, in December 2021, researchers at Moffitt Cancer Center are working to develop a dendritic cell vaccine targeting HER3, a protein involved in the growth and spread of many different cancer types, including bladder, breast, lung adenocarcinoma, prostate, and stomach.

Similarly, in November 2021, Bioanalytical Systems, Inc. launched its new contract research service brand, Inotiv. Inotiv started representing the union of the company's Seventh Wave Laboratories & Smithers Avanza Toxicology Services, working in vivo toxicology, pharmacology, bioanalysis, drug metabolism, and pharmacokinetic solutions. Thus, given the factors above, the oncology based in-vivo CRO market is expected to witness tremendous growth over the forecast period.

However, the availability of alternatives and quality issues with CRO hamper the market's growth.

Oncology based In-Vivo CRO Market Trends

Solid Tumor Segment is Expected to Hold the Largest Market Share in the Oncology Based In-Vivo CRO Market

A solid tumor is an abnormal clump of cells containing no liquid or cyst. The major factors responsible for this segment's growth include new product approvals in ovarian, pancreatic, and prostate cancers and increasing government initiatives for cancer awareness. In addition, the other crucial driving factor is the increasing incidence of cancer. For instance, cancer has a significant impact on societies across the world. Increasing cancer cases is one of the key factors in market growth. The most common cancers in 2021 were breast cancer, lung and bronchus cancer, prostate cancer, colon and rectum cancer, bladder cancer, melanoma of the skin, non-Hodgkin lymphoma, thyroid cancer, kidney and renal pelvis cancer, leukemia, endometrial cancer, pancreatic cancer. Cancer rates could increase by 50% to 15 million new cases by 2021, according to the World Cancer Report. Growing cancer is expected to increase the demand for therapies as the high burden of disease is fueling the demand for outsourcing drug development activities which is further expected to boost market growth during the forecast period. It also provides clear evidence that healthy lifestyles and public health action by governments and health practitioners could prevent this trend and prevent as many as one-third of all cancers worldwide. The American Cancer Society, the leading body in cancer stats and figures, reports 1,685,210 estimated new cancer cases and 595,690 deaths, due to cancer in 2021, in the United States. Hence, the increasing number of patients is expected to drive the market during the forecast period.

Similarly, various research studies provide insight into the use of therapies on solid tumors. For instance, a research report published in the National Library of Medicine in May 2022 stated that recently established methodologies had shown that it would be possible to get around the study's biological limitations and boost CAR-T therapy's efficacy and safety for solid tumors. Similarly, a research study published in the Journal of Parental and Enteral Nutrition in May 2022 shows solid tumors with esophageal cancer, urothelial cancer, cholangiocarcinoma, prostate cancer, sarcomas, and thyroid cancer all had a prevalence of sarcopenia greater than 50%. Sarcopenia was present in between 35% and 50% of cases of head and neck squamous cell carcinoma, pancreatic cancer, lung cancer, renal cell cancer, and ovarian cancer. Low skeletal muscle mass was prevalent in about 35% of colorectal cancer, gastric cancer, hepatocellular cancer, and breast cancer. Sarcopenia was commonplace in both the curative and palliative settings, at 39.6% and 49.2%, respectively. Increasing sarcopenia requires treatment which is expected to increase the demand for the outsourcing of drug development and increase the market growth during the forecast period.

Thus, the abovementioned factors are expected to increase market growth during the forecast period.

North America Dominates the Market and Expected to do Same in the Forecast Period

North America is expected to dominate the overall oncology-based In-Vivo CRO market, throughout the forecast period owing to the increased adoption of cancer therapy and the growing burden of cancers in the United States. According to the Globocan 2021 report, an estimated 2,281,658 new cancer cases were diagnosed in the United States in 2021, with nearly 612,390 deaths. In 2021, The most common cancers were breast (253,465), lung (227,875), prostate (209,512), and colon (101,809) in the United States. Increasing cancer cases are expected to increase the adoption of various cancer therapies which is expected to increase the growth of studied market in the region.

Additionally, the high concentration of key players in North America, increasing FDA approvals strategic alliances, and high investment in research and development activities are expected to boost the market in the region. For instance, in November 2021, Merck & Co. Inc entered into a definitive agreement to acquire Velosbio Inc., which is a privately held clinical-stage biopharmaceutical company committed to developing first-in-class cancer therapies targeting receptor tyrosine kinase-like orphan receptor 1 (ROR1). Similarly, in March 2021, Johnson and Johnson received the US FDA Breakthrough Therapy Designation for JNJ-61186372 (JNJ-6372) for the treatment of patients with metastatic non-small cell lung cancer (NSCLC).

Thus, given the aforementioned factors, the cancer based in-vivo CRO market is expected to grow significantly over the forecast period in North America.

Oncology based In-Vivo CRO Market Competitor Analysis

The oncology-based In-Vivo CRO market is moderately competitive and consists of several major players. In terms of market share, few of the major players have been currently dominating the market. And some prominent players have been vigorously making acquisitions and joint ventures with other companies to consolidate their market positions worldwide. Some companies currently dominating the market are Crown Bioscience Inc., Charles River Laboratories Inc., ICON PLC, Taconic Biosciences Inc., Covance Inc., Eurofins Scientific, EVOTEC, The Jackson Laboratory, Wuxi AppTec. and MI Bioresearch Inc.

Additional Benefits:

  The market estimate (ME) sheet in Excel format
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