

Granisetron Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The granisetron market is expected to register a CAGR of 5.7% over the forecast period.

The key factors propelling the market are the rise in chemotherapy and radiotherapy visits along with the increasing prevalence of gastroparesis. The rising burden of cancer will propel the chemotherapy and radiotherapy visits, which is expected to drive the market growth significantly.

The world has been facing the huge threat of COVID-19. As per the World Health Organization (WHO), COVID-19 is infectious, and most people infected by the virus experience mild to moderate respiratory illness. COVID 19 primarily affected the supply chain of the granisetron market in terms of the availability of raw materials and supplies, transportation delays, and prices. Nationwide lockdowns and social distancing measures have reduced patient visits for anti-cancer treatment significantly. This has further reduced the sales of granisetron. Many of the leading players in the studied market, such as Novartis and Viartis has registered a decline in sales in 2020 compared to 2019.

Furthermore a study titled 'Impact of COVID-19 on cancer care in India: a cohort study' in 2021, reported that, the number of new patients registered decreased from 112,270 to 51,760, patients who had follow-up visits decreased from 634,745 to 340,984, hospital admissions decreased from 88,801 to 56,885, outpatient chemotherapy decreased from 173,634 to 109,107 between March 1 and May 31, 2020. Moreover according to an article 'What is the Clinical Impact of COVID-19 on Cancer Patients?' in 2020, the increased vulnerability of cancer patients to COVID-19, particularly to the severe effects of this infectious disease, has led some patients to delay or pause their anti-cancer treatments to reduce their exposure to potentially infected people, and this condition during pandemic has affected the market significantly.

The study "Granisetron transdermal system and dexamethasone for the prevention of nausea and vomiting in multiple myeloma patients receiving chemo-mobilization: An observational real-world study of effectiveness and safety" published in December 2020 stated that granisetron transdermal system (GTDS) provided an innovative, effective, and well-tolerated control of

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chemotherapy-induced nausea and vomiting with an effective rate of 39.77%. Therefore, the studies evaluating the efficacies of GTDS will significantly increase its adoptability, which will propel the market growth.

The above study indicates that granisetron is used to address the symptoms of chemotherapy which is given to cancer patients. Therefore, the growing burden of cancer across the globe will ramp up the production of granisetron which will boost the market. For instance, the International Agency for Research on Cancer (IARC) 2020 estimated that globally, 1 in 5 people anticipated to develop cancer during their lifetime, and 1 in 8 men and 1 in 11 women would die from the disease. Breast cancer is common among women whereas lung and prostate cancer is common among men. Thus, high prevalence of the diseases globally will positively impact the granisetron manufacturing and consumption, thus driving the market.

Additionally, the study "Gastroparesis" published in National Center for Biotechnology Information and updated in December 2021, suggested that Granisetron, a 5-HT3 antagonist, administered as a transdermal patch, has improved gastroparesis symptoms of nausea and vomiting. Thus, the studies evaluating the efficacies for treating symptoms of gastroparesis, will boost the administration of granisetron, which is expected to fuel the market growth.

Thus, due to the above-mentioned factors, the studied market is expected to grow significantly during the study period. However, adverse effects of granisetron is expected to hinder the market growth.

Granisetron Market Trends

The Injection Segment is expected to witness significant growth in the market

Granisetron hydrochloride injection is a serotonin-3 (5-HT3) receptor antagonist indicated for the prevention of nausea and vomiting associated with initial and repeat courses of emetogenic cancer therapy, including high-dose cisplatin. The recommended dosage for granisetron hydrochloride injection in adults is 10 mcg/kg whereas the recommended dose in pediatric patients 2 to 16 years of age is 10 mcg/kg. When granisetron is used to prevent nausea and vomiting caused by cancer medicines (chemotherapy), it is usually given 30 minutes before the start of chemotherapy. However, when used to prevent and treat nausea and vomiting caused by surgery, it is usually given 30 seconds before anesthesia or right after surgery if nausea and vomiting begin.

The study "Granisetron Extended-Release Subcutaneous Injection versus Palonosetron Infusion for CINV Prevention: Cost Comparison of Unscheduled Hydration" published in September 2021, suggested that the use of subcutaneous granisetron reduced the total per-patient costs of care associated with unscheduled hydration compared with palonosetron in patients receiving emetogenic chemotherapy for breakthrough chemotherapy-induced nausea and vomiting events. Thus, the studies indicating the cost effectiveness of using granisetron over other alternatives will increase its demand, which will drive the segmental growth. Furthermore, according to the study "The Effect of Granisetron on Sensory Detection and Pain Thresholds in Facial Skin of Healthy Young Males" published in April 2020, granisetron injection decreased the sensitivity to mechanical stimuli and increased the sensitivity to heat indicating that granisetron injection can be considered a novel candidate for local anesthetics. Thus, the expanded use of granisetron injection will also lead to lucrative growth of the market.

Thus, due to the above-mentioned factors, the studied market is expected to grow significantly during the study period.

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

North America is the most affected region across the world, with a high prevalence of cancer. The United States dominates the North American region in the terms of cancer burden. With the rising prevalence of cancer and gastroparesis in the country, the studied market is expected to witness significant growth in the region.

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According to the estimates of GLOBOCAN, in 2020, 2,281,658 new cancer cases were diagnosed in the United States among people of both sexes and all ages. The high incidence of cancer indicates the increasing patient visits for chemotherapy and radiotherapy, thereby increasing the demand for granisetron for addressing the symptoms thereby leading to positive growth of the market. Additionally, the presence of major market players such as Heron Therapeutics will also boost the market. For instance, net product sales of SUSTOL (granisetron) extended-release injection, manufactured by Heron Therapeutics, for the three and twelve months ended December 31, 2021 were USD 2.5 million and USD 9.9 million, respectively, compared to USD 0.3 million and USD 0.8 million, respectively, for the same periods in 2020. This indicates that demand for granisetron has increased over last year and is expected to continue to do so during study period, thereby driving the market.

Furthermore, according to a study "A phase III study of transdermal granisetron versus oral ondansetron for women with gynecologic cancers receiving pelvic chemoradiation" published in January 2021, transdermal granisetron was 82% more like to control chemotherapy-induced nausea and vomiting than oral ondansetron in the late phase of cycle 1 and therefore should be considered as an option for prophylactic antiemetic therapy for gynecologic cancer survivors undergoing chemoradiation. The studies, highlighting the clinical efficacies and safety of granisetron will fuel the market growth in future.

Thus, aforementioned factors are anticipated to lead to significant growth of the market in the region during the study period.

Granisetron Market Competitor Analysis

The major players in the market are Kyowo Kirin Co., Ltd., Heron Therapeutics, Fresenius Kabi AG, Hikma Pharmaceuticals and Viartis among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format

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