

Androgen Deprivation Therapy Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Androgen Deprivation Therapy Market is expected to grow at a significant CAGR of 5.2% during the study period, 2022-2027.

The emergence of the COVID-19 pandemic had an adverse effect on the world economy and the healthcare system. It has impacted the androgen deprivation therapy market, as cancer patients, especially prostate cancer patients, are more susceptible to coronavirus than individuals without cancer, as they are in an immunosuppressive state caused by the malignancy and anticancer treatment. Thus, they were majorly suggested to stay at home and avoid all non-emergent treatment, which has impacted the market. Additionally, According to the study "Effects of Androgen Deprivation Therapy on COVID-19 in Patients with Prostate Cancer: A Systematic Review and Meta-Analysis," published in July 2021, ADT did not increase the mortality and morbidity of COVID-19 and should be considered a safe treatment for patients with prostate cancer during the pandemic. Such studies boosted the ongoing androgen therapy treatments. However, due to outages in the manufacturing plants, there was a supply chain disruption which has impacted the supply of the medication used for androgen deprivation therapy, thus, impacting the market.

The factors propelling the studied market growth are the rising burden of prostate cancer, increasing research and development activities, advancements in treatment technology for effective treatment of prostate cancer, rising product approvals, and strategic initiatives adopted by key market players.

As per the data published by GLOBOCAN, in 2020, the prevalence of prostate cancer was found to be 1,414,259, or 7.3% of the total cancer cases worldwide. The huge burden of prostate cancer globally generates the demand for effective treatment, hence driving the androgen deprivation therapy market.

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According to an article published by the American Cancer Society in January 2022, prostate cancer is common among people aged 65 years and above. Therefore, the growing geriatric population will also boost the demand for its therapeutics, thus driving the market. According to World Population Prospects' 2020 statistics, by 2050, 15 billion in the world will be over age 65 years, and at present, it is 727 million. Thus, the rising aging population in the world is expected to propel market growth.

Additionally, strategies such as partnerships, distribution agreements, mergers, and acquisitions adopted by key market players will boost the market growth. For instance, in May 2022, Myovant Sciences and Accord Healthcare, Ltd. entered into an exclusive license agreement for Accord to commercialize Relugolix for the treatment of advanced hormone-sensitive prostate cancer under the trade name ORGOVYX (Relugolix, 120 mg) in the European Economic Area, United Kingdom, Switzerland, and Turkey. Such partnerships will expand the accessibility of ORGOVYX across geographies, thereby leading to lucrative growth of the market.

Furthermore, the achievement of milestones in the drug development cycle will also fuel market growth. For instance, in May 2022, Bayer reported that the United States Food and Drug Administration (FDA) had accepted a supplemental New Drug Application (sNDA) and granted Priority Review for the oral androgen receptor inhibitor (ARi) darolutamide in combination with docetaxel for the treatment of metastatic hormone-sensitive prostate cancer (mHSPC).

Therefore, owing to the aforementioned factors, the studied market is expected to grow significantly during the study period. However, limited reimbursement policies and increasing side effects is expected to hinder the market growth during the study period

Androgen Deprivation Therapy Market Trends

Antiandrogen Sub Segment Within Drug Class Segment is Expected to Account Large Market Share Over the Forecast Period

Anti-androgens are drugs that connect to the androgen receptors, inhibiting the androgens from causing tumor growth. Anti-androgens are also sometimes called androgen receptor antagonists. Antiandrogens drug include Flutamide (Eulexin), Bicalutamide (Casodex), Nilutamide (Nilandron), Enzalutamide (Xtandi), apalutamide (Erleada) and darolutamide (Nubeqa).

Factors such as rising incidences of prostate cancer globally, product approvals, growing geriatric population, increasing research and development activities, and strategies adopted by key market players such as partnerships will effectively contribute to the market growth.

The growing research activities in the segment are expected to fuel the market growth. For instance, In December 2021, Bayer published the results from the Phase III ARASENS trial, which investigated the use of the oral androgen receptor inhibitor (ARi) Nubeqa (darolutamide), an anti-androgen, in metastatic hormone-sensitive prostate cancer (mHSPC). The company stated that darolutamide, in combination with docetaxel and androgen deprivation therapy (ADT), significantly increased overall survival compared to docetaxel and ADT.

Additionally, in September 2021, Astellas Pharma Inc. and Pfizer Inc. stated that XTANDI (enzalutamide), an anti-androgen, improved overall survival in men with metastatic hormone-sensitive prostate cancer in which is proved through the ARCHES study. Such studies highlight the efficacies of anti-androgens in treating prostate cancer in terms of increased overall survival rate, which boosts the application of anti-androgen, hence driving the market.

Furthermore, In February 2021, Bayer, in partnership with Orion Corporation, expanded the global clinical development program for the oral androgen receptor inhibitor (ARi) Nubeqa (darolutamide) in the area of prostate cancer. The company initiated a Phase III study ARANOTE which will evaluate the compound in addition to androgen deprivation therapy (ADT) versus placebo plus ADT in men with metastatic hormone-sensitive prostate cancer (mHSPC). Such strategies will allow companies to leverage others'

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strengths and develop an advanced product in the area of prostate cancer, thereby leading to lucrative growth of the market.

Thus, due to the above-mentioned factors, the studied segment is expected to contribute to the significant 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 primary driving factors for the growth of the North American androgen deprivation therapy (ADT) market are the rising prevalence of prostate cancer, the growing geriatric population, product launches, and several initiatives and investments made by key market players.

The United States within North America is expected to hold a significant share of the studied market during the study period. Prostate cancer is the most common cancer in American men. The American Cancer Society estimates that in the United States, in 2022, about 268,490 new cases of prostate cancer and approximately 34,500 deaths from prostate cancer will be reported. Thus, a huge burden of prostate cancer in the country increases the demand for its therapeutics, which can suppress the amount of testosterone formed, thereby contributing to the market growth.

The above-mentioned source also suggests that prostate cancer is more likely to develop in older men. About 6 cases in 10 are diagnosed in men who are 65 or older, and it is rare in men under 40. The average age of men at diagnosis is about 66. Thereby, the growing elderly population in the region will also increase the incidence rate of prostate cancer, hence propelling the market.

The rising research and development studies that are proving the efficacies of androgen receptor inhibitors in treating pancreatic cancer will contribute to the market growth. For instance, in February 2021, the Janssen Pharmaceutical Companies of Johnson & Johnson released results from the final analysis of the Phase 3 TITAN study stating that ERLEADA, in combination with ADT, provided a statistically significant improvement in overall survival rate with a 35% reduction in risk of death versus ADT alone. Such technological improvement in treatment procedures is expected to drive market growth.

In January 2021, the United States Food and Drug Administration approved Relugolix (Orgovyx) for treating adults with prostate cancer as it is more effective at reducing testosterone levels in men with advanced prostate cancer than another commonly used treatment, leuprolide (Lupron).

Therefore, due to the above-mentioned factors, the studied market is expected to lead to lucrative growth of the market in North America.

Androgen Deprivation Therapy Market Competitor Analysis

The market is fragmented and moderately competitive. The strategies such as mergers and acquisitions and partnerships adopted by the key players will boost the market. The major players in the market are Johnson and Johnson, AstraZeneca, Bayer AG, Astellas Pharma, Tolmar Pharmaceuticals Inc., and others.

Additional Benefits:

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

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