

Chemotherapy-Induced Neutropenia (Cin) Treatment Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Chemotherapy-Induced Neutropenia (CIN) Treatment market is projected to grow with a CAGR of 3.5% during the forecast period (2023 - 2028).

The COVID-19 pandemic has affected the healthcare systems globally and resulted in the interruption of usual care in many healthcare facilities, exposing vulnerable patients with cancer to significant risks. Since the beginning of the COVID-19 pandemic, measures have been taken to increase the admissions of covid patients and reduce the number of non-covid patients in the hospitals, which has led to postponing the treatment. As per the article published in Cancer Connect 2020, doctors from Dana Farber Cancer Institute determined that during the COVID-19 pandemic, there was a 46% decrease in the diagnoses of the six most common cancer types - breast, colorectal, lung, pancreatic, gastric, and esophageal cancers. In addition, according to an article published by the National Center for Biotechnology Information, in 2021, nearly 650,000 cancer patients (including breast cancer) receive chemotherapy yearly in the United States. Thus, the growing number of patients receiving chemotherapy increases the risk of developing chemotherapy-induced neutropenia, which further increases the demand for chemotherapy-induced neutropenia treatment and propels the market's growth.

In addition, according to an article published in the JAMA Network in August 2020, there was a significant decline in breast cancer diagnoses (by 51.8%) in the United States from March 1, 2020, to April 18, 2020. Similarly, according to an article titled '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 initial pandemic phase affected the market adversely. Hence, the delay in diagnosing and treating cancers has impacted the market. However, with resumed procedures and chemotherapy treatment, the demand for chemotherapy-induced neutropenia treatment therapy will likely increase over the

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coming years.

The factors propelling the market's growth are the rising prevalence of cancer, increasing use of chemotherapy, and increasing company focus on discovering novel medicines for neutropenia therapy. The rising prevalence of cancer and increasing use of chemotherapy for its treatment, leading to chemotherapy-induced neutropenia in cancer patients, is the key factor driving the market's growth over the forecast period. For instance, according to the statistics published by the Global Cancer Observatory (Globocan), in 2021, there was over 19.3 million cancer cases, in 2020 worldwide. In addition, female breast cancer has surpassed lung cancer as women's most commonly diagnosed disease, with an anticipated 2.3 million new cases diagnosed in 2020. As per Cancer Australia, in 2021, it was estimated that 20,030 new breast cancer cases were diagnosed in Australia (164 males and 19,866 females). According to an article published by the National Center for Biotechnology Information in 2021, titled "Chemotherapy-induced neutropenia and febrile neutropenia among breast cancer patients in a tertiary hospital in Nigeria," it has been observed that during chemotherapy, one out of every three breast cancer developed neutropenia.

However, the high cost of neutropenia treatment and strict rules and regulations for product approvals are expected to restrain the neutropenia treatment market's growth during the forecast period.

Chemotherapy-Induced Neutropenia (CIN) Treatment Market Trends

Granulocyte Colony-Stimulating Factor Therapy Segment Expects to Register a High CAGR in the Forecast Period

Granulocyte Colony-Stimulating Factor Therapy (G-CSF) is the most common treatment for cancer-related neutropenia and is one of the most widely prescribed supportive care medications for breast and lymphoma malignancies. For instance, filgrastim, a recombinant human granulocyte colony-stimulating factor therapy, boosts neutrophilic granulocyte production in patients suffering from chemotherapy-induced neutropenia and febrile neutropenia. Similarly, according to an article published by the National Center for Biotechnology Information, in 2020, titled "Supportive care in patients with cancer during the COVID-19 pandemic", it has been observed that the use of prophylactic granulocyte colony-stimulating factor (G-CSF) in the cancer patients with chemotherapy has a low or intermediate risk of developing neutropenia in patients.

In addition, the increasing prevalence of cancer patients increases the demand for chemotherapy treatment which further increases the demand for granulocyte colony-stimulating factor therapy to reduce the risks of developing neutropenia.

Furthermore, the increasing company focus on developing granulocyte colony-stimulating factor therapy drugs for treating chemotherapy-induced neutropenia in cancer patients through various business strategies such as product launches, agreements, mergers, and collaboration are also contributing to the growth of the market over the forecast period. For instance, in February 2022, Lupin entered into a license, supply, and technology sharing agreement with Axantia Holding. Under this agreement, Axantia will be responsible for registering, distributing, and marketing biosimilar Pegfilgrastim drug products in certain territories, including Saudi Arabia, certain GCC countries, Jordan, Lebanon, Iraq, Sudan, Libya, and Algeria.

Thus, with the adoption of Granulocyte Colony-Stimulating Factor Therapy (G-CSF) as the primary treatment and increasing company focus on developing effective therapies for treatment against neutropenia in cancer patients, the studied segment is expected to grow over the forecast period.

North America is Expected to Have the Significant Market Share

North America is anticipated to have a significant market share owing to the factors such as the increasing prevalence of cancer, rising demand for disease-specific treatment, high healthcare spending and well-defined infrastructure, and the presence of the market players in the region.

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The rising prevalence of cancer cases in the region is the key driving factor for the market's growth over the forecast period as they require chemotherapy as treatment which further leads to neutropenia. According to the Globocan 2020 report, an estimated 2,281,658 new cancer cases were diagnosed in the United States in 2020. In 2020, The most common cancers were breast (253,465), lung (227,875), prostate (209,512), and colon (101,809) in the United States. According to an article published by the National Center for Biotechnology Information in 2021, titled "Chemotherapy-Induced Neutropenia Burden in Cancer Patients," in the United States, chemotherapy-induced neutropenia continues to be a considerable burden on cancer patients in terms of hospitalization and mortality, as well as on healthcare systems in terms of expense.

Furthermore, the increasing company focus on developing advanced and efficient therapies for treating chemotherapy-induced neutropenia and increasing drug approvals is also contributing to the market growth in the region. For instance, in June 2021, BeyondSpring Inc. filed a new drug application along with a priority review, for its plinabulin in combination with granulocyte colony-stimulating factor (G-CSF) for the prevention of chemotherapy-induced neutropenia (CIN), to the United States Food and Drug Administration. In addition to this, in September 2020, the United States Food and Drug Administration (FDA) and China's Center for Drug Evaluation (CDE) of the National Medical Products Administration (NMPA) granted breakthrough therapy designation to pinabulin.

Thus, the increasing prevalence of cancer, use of chemotherapy as treatment, and increasing research and development activities in the region are propelling the growth of the market in the region over the forecast period.

Chemotherapy-Induced Neutropenia (CIN) Treatment Market Competitor Analysis

The chemotherapy-induced neutropenia treatment market is fairly fragmented by the presence of many players in the market. The market players are utilizing strategies such as product launches, mergers & acquisitions, and contracts & collaborations. Some players are Amgen, Inc., Teva Pharmaceuticals Industries Ltd., Novartis AG, G1 Therapeutics, and BeyondSpring Pharmaceuticals Inc.

Additional Benefits:

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

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