Head and Neck Cancer Therapeutics Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Head and Neck Cancer Therapeutics Market is expected to register a CAGR of 9.0% over the forecast period.

The COVID-19 pandemic substantially impacted the head and neck cancer therapeutics market. The pandemic mainly affected cancer patients who were highly immunocompromised, subjecting them to extreme lockdowns and preventing them from the necessary treatment. Also, cancer screening and other health prevention services, along with elective surgeries, were postponed unless the risks outweighed the benefits and to secure the hospital infrastructure to treat COVID-19 patients. According to the article published by National Center for Biotechnology Information in April 2022, the pandemic postponed several elective surgeries, including head and neck surgeries in industrialized countries. This led to the postponement of almost 60% of the European Institute of Oncology (IEO) scheduled outpatient visits between March and April 2020. Hence, the involvement of medical personnel in the care of COVID-19 patients resulted in a delay in the treatment of head and neck cancer patients, which led to an increase in tumor growth, recurrences, and mortality rates. Thus, the COVID-19 pandemic has impacted the head and neck cancer diagnostics market. However, the situation is expected to improve gradually due to the surging demand for nonsurgical therapeutics like targeted therapy and chemotherapy.

Further, the surging prevalence of neck and head cancer, the increase in combination therapy demand for treating these cancers, and tremendous growth in the R&D activities for developing novel therapeutics for cancer treatment are among the major factors driving the growth of the market studied. Such factors are likely to boost the adoption of head and neck cancer therapeutics, thereby contributing to the growth of the market studied.

As per the American Society of Clinical Oncology (ASCO) August 2022, head and neck cancer is the seventh most occurring cancer globally, and more than 1.0 million cases are diagnosed yearly. Thus, the rising prevalence of head and neck cancer is significantly impacting the market growth. Additionally, the presence of many drug molecules under the pipeline and the subsequent approval of these drugs for the treatment of head and neck cancer is another factor responsible for market growth. For instance, in February 2021, Kura Oncology, Inc., a company focused on providing precision medicines for cancer treatment, received approval for its tipifarnib drug from the U.S. FDA. This drug provides therapy to patients suffering from metastatic or recurrent HRAS mutant head and neck squamous cell carcinoma (HNSCC). It is a potent drug that is orally administrable and selective in nature. Thus, owing to the surging number of drug approvals for the treatment of head and neck cancer the market studied is expected to have significant growth over the forecast period.

Moreover, in the recent few years, the prominent players are actively involving themselves in various strategic measures which are positively affecting the market growth. For instance, in December 2021, Sanofi SA announced the acquisition of Amu nix Pharmaceuticals, Inc., to boost and expand its oncology portfolio. The former will leverage the latter's clinically proven XTEN, and Pro-XTEN technologies, for the discovery and development of transformative T-cell engagers and cytokine-based therapies for the treatment of head and neck cancer. Thus, owing to the mergers and acquisitions, the market studied is expected to have significant growth over the forecast period.

Therefore, owing to the aforementioned factors the market studied is anticipated to witness growth over the forecast period. However, the various side effects associated with the prolonged use of head and neck cancer therapeutics are likely to impede market growth.

Head & Neck Cancer Therapeutics Market Trends

Immunotherapy Segment is Expected to Witness Significant Growth Over the Forecast Period

Immunotherapy improves the body's natural defenses to combat cancer. It employs elements made by the body or in a laboratory to enhance the immune system to discover and damage cancer cells. The major factors responsible for the high segment growth are the increased adoption of immunotherapeutic drugs and the presence of numerous drugs in the R&D pipeline. For instance, in January 2022, Nanobiotix, a late-stage clinical biotechnology company, declared the enrollment of the first patient in NANORAY-312, a phase III clinical trial, to investigate the safety and efficacy of NBTXR3. This drug candidate has shown high efficiency in treating head and neck cancer in elderly patients.

Additionally, in the past few years, there has been a surge in the approval of various immunomodulators, such as Pembrolizumab (Keytruda) by Merck & Co., Inc. in March 2022 and Dostarlimab (Jemperli) by GlaxoSmithKline plc in August 2021. Thus, the increasing number of approvals of immunotherapeutic drugs for head and neck cancer treatment is creating ample opportunities for the segment's growth over the future.

According to the article published in Elsevier in June 2022, the adoption of immunotherapies for the treatment of head and neck cancer has changed the treatment landscape. Immunosuppressive pathways, which are involved in the interaction between tumor cells and T lymphocytes, are the main targets of immunomodulatory medicines. In August 2022, Frontiers published an article stating that due to the high potential of immunotherapies in producing a significant and long-lasting antitumor effect, it is considered an effective treatment approach for the treatment of head and neck squamous cell carcinomas. The use of numerous immunotherapy techniques, such as costimulatory agonists, immune checkpoint inhibitors, antigenic vaccines, adoptive T cell transfer (ACT), oncolytic virus therapy, and EGFR-targeted therapy, is now being made in the treatment of HNSCC.

Therefore, the immunotherapy segment is expected to witness significant growth over the forecast period due to the abovementioned factors.

North America is Expected to Dominate the Head and Neck Cancer Therapeutics Market

North America is expected to dominate the market owing to factors such as the developed healthcare infrastructure and the active participation of various government organizations to combat the growing burden of head and neck cancer. For instance, American Head and Neck Society is among the largest organization present in North America for the improvement of R&D education in head and neck oncology in the region. The organization focuses on improving the care of head and neck reconstructive surgery through education while concentrating on the quality of care.

A high number of head and neck cancer incidents in the United States is among the key factors contributing to the growth of the market studied in North America. As per the American Society of Clinical Oncology (ASCO), head and neck cancer record 4% of all deaths in the United States. Also, the organization estimated that there would be around 66,470 people who will be diagnosed with head and neck cancer in the United States in 2022, out of which 48,520 would be men and 17,950 would be women.

Furthermore, the regional players are actively involving themselves in product launches, mergers, and acquisitions to attain a significant position in the market, which is boosting the regional market growth. For instance, in November 2022, Fulgent Genetics, Inc., a technology-based gene testing company based in the United States, announced the acquisition of Fulgent Pharma Holdings, Inc. to provide an integrated solution to combat head and neck cancer in the region. Thus, mergers and acquisitions amongst key players is another factor that is augmenting the regional market growth.

Therefore, owing to the aforesaid factors, the growth of the studied market is anticipated in the North America Region.

Head & Neck Cancer Therapeutics Market Competitor Analysis

The global key players manufacture most head and neck cancer therapeutics. Market leaders with more funds for research and a better distribution system have established their position in the market. The competitive landscape includes an analysis of international and local companies that hold the market shares and are well known, including Eli Lilly and Company, Sanofi, Merck & Co., Inc., Clinigen Limited, Bristol-Myers Squibb Company, AstraZeneca Plc., GlaxoSmithKline plc., and others.

Additional Benefits:

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

Table of Contents:

4.3 Market Restraints
4.3.1 Cytotoxic Nature of Chemotherapeutic Drugs
4.4 Porter's Five Forces Analysis
4.4.1 Threat of New Entrants
4.4.2 Bargaining Power of Buyers/Consumers
4.4.3 Bargaining Power of Suppliers
4.4.4 Threat of Substitute Products
4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value - USD million)
5.1 By Type
5.1.1 Chemotherapy
5.1.2 Immunotherapy
5.1.3 Targeted Therapy
5.2 By Route of Administration
5.2.1 Injectable
5.2.2 Oral
5.3 By Distribution Channel
5.3.1 Retail & Specialty Pharmacies
5.3.2 Hospital Pharmacies
5.3.3 Online Pharmacies
5.4 By Geography
5.4.1 North America
5.4.1.1 United States
5.4.1.2 Canada
5.4.1.3 Mexico
5.4.2 Europe
5.4.2.1 Germany
5.4.2.2 United Kingdom
5.4.2.3 France
5.4.2.4 Italy
5.4.2.5 Spain
5.4.2.6 Rest of Europe
5.4.3 Asia-Pacific
5.4.3.1 China
5.4.3.2 Japan
5.4.3.3 India
5.4.3.4 Australia
5.4.3.5 South Korea
5.4.3.6 Rest of Asia-Pacific
5.4.4 Middle East
5.4.4.1 GCC
5.4.4.2 South Africa
5.4.4.3 Rest of Middle East
5.4.5 South America
5.4.5.1 Brazil
5.4.5.2 Argentina

5.4.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE
6.1 Company Profiles
6.1.1 Eli Lilly and Company
6.1.2 Sanofi
6.1.3 Merck & Co., Inc.
6.1.4 Clinigen Limited
6.1.5 Bristol-Myers Squibb Company
6.1.6 AstraZeneca Plc.
6.1.7 GlaxoSmithKline plc.
6.1.8 Teva Pharmaceutical Industries Ltd.
6.1.9 F. Hoffmann-La Roche Ltd.
6.1.10 Takeda Pharmaceutical Company Limited

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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