

Europe Cancer Therapeutics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Europe Cancer Therapeutics Market size is estimated at USD 58.32 billion in 2024, and is expected to reach USD 75.79 billion by 2029, growing at a CAGR of 5.38% during the forecast period (2024-2029).

At the start of the global spread of COVID-19 in early 2020, patients with cancer were designated as a particularly vulnerable subgroup of the population. Cancer patients have been reported to be both at increased risk of contracting SARS-CoV-2 infection and of running a more severe disease course, with a higher proportion requiring greater levels of intensive care, having a more rapidly evolving disease, and an increased risk of death. Additionally, it seems that cancer treatment does not associate with COVID-19 severity, which could help cancer patient's well-being during this pandemic. The consequences of this pandemic for the cancer therapeutics market seemed to be heavy, as the entire healthcare system got reorganized.

The driving factors for the growth of the European cancer therapeutics market include the ease in regulatory approval for novel cancer therapy in Europe, the rising prevalence of cancer, and strong R&D investments by the key players in the region. According to the International Agency for the Research on Cancer, 2021 data reported that the number incidence of cancer cases for the European region in the year 2020 was 4.79 million cancer cases and the number is expected to increase to 6.07 million by 2040. Thus, increasing the incidence of cancer cases is more likely to drive the market.

In addition, the heavy investments made in R&D activities have enhanced the development of cancer therapeutics. Furthermore, favorable government regulations for cancer therapeutics and recent mergers, acquisitions, and launches within the key market players have also boosted the growth of the market. For instance, in May 2020 Boehringer Ingelheim acquired Northern Biologics, a wholly owned subsidiary of Northern LP. This acquisition has assisted the company to add two complementary assets to its existing cancer immunology portfolio including cancer vaccines, oncolytic viruses, T-cell engagers, and myeloid cell modulators.

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Thus, due to the aforesaid mentioned reasons the company is expected to show significant growth over the forecast period, however high cost of cancer therapies, and inequality in access to cancer therapy across Europe may slow down the growth of the market.

Europe Cancer Therapeutics Market Trends

Target Therapy is Expected to Witness Significant Growth over the Forecast Period (2022-2027)

Targeted therapy is a treatment used for cancer, in which the drugs work by targeting the specific genes or proteins that are present in the cancer cells. There are several types of targeted therapies for cancers, such as hormone therapies, gene expression modulators, apoptosis inducers, angiogenesis inhibitors, signal transduction inhibitors, and many other therapies.

The major factors driving the growth of the target therapy segment are the increase in product launches and approvals by various key market players for the treatment of various types of cancers. For instance, in 2020 GSK's Zejula received approval as a first-line maintenance treatment in the United States and the European Union, and in February 2020, GSK entered into a strategic collaboration agreement with Immatics Biotechnologies to develop novel adoptive cell therapies targeting multiple cancer indications. These targeted therapy and new launch of drug molecules and their approval are also gaining importance due to their specificity toward cancer cells while sparing the toxicity to off-target cells. For another instance, in 2021 the United States Food and Drug Administration (FDA) approved JEMPERLI (a new indication of GlaxoSmithKline PLCs) which is a programmed cell death receptor-1 (PD-1) blocking antibody, for the treatment of adult patients with mismatch repair-deficient (dMMR) recurrent or advanced solid tumors.

Breast cancer is the most prevalent cancer in the region, and the increasing incidence of this cancer and effective treatment of the targeted therapy in breast cancer patients are boosting segment growth. For instance, in 2021, International Agency for Research on Cancer reported that the Europe region reported 576 thousand breast cancer cases in 2020, and this number is expected to increase by 650 thousand by 2040. Thus, the increasing incidence of cancer cases is leading to an increase in targeted therapy, thereby boosting the demand for the market segment.

Therefore, owing to the rising approval from regulatory bodies and an increase in the prevalence of all types of cancer, the segment is expected to witness a high growth rate over the forecast period.

Germany is Expected to Witness Significant Growth over the Forecast Period (2022-2027).

Germany is expected to show significant growth over the forecast due to a high number of cancer cases reported in the region and also due to the large number of clinical trials being conducted in the region. The International Agency for Research on Cancer 2021, reported quoted that the number of cancer cases in the Germany region in the year 2020 was 629 thousand and this number is expected to increase to 750 thousand by the end of 2040. The rate of cancer growth in the region was about 19.2%. Thus, the high rate of cancer cases and the increasing number of cancer cases is increasing the demand for cancer therapeutics thereby driving the market in the region.

Also, clinical trials and cancer-related research in the region are fueling the market the region. For instance, in November 2021 an article titled, "Chemoradiotherapy Plus Induction or Consolidation Chemotherapy as Total Neoadjuvant Therapy for Patients With Locally Advanced Rectal Cancer Long-term Results of the CAO/ARO/AIO-12 Randomized Clinical Trial" research related to neoadjuvant therapy has been increasingly adopted for multimodal rectal cancer treatment. The clinical trial was conducted in Germany. Thus, such kind of clinical trials and research studies is driving the market in the market for cancer therapeutics.

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Thus, due to the aforesaid mentioned reasons the market is expected to show significant growth over the forecast period.

Europe Cancer Therapeutics Industry Overview

The Europe cancer therapeutics market is fragmented in nature due to the presence of fewer companies operating globally as well as regionally. The competitive landscape includes an analysis of a few international as well as local companies which hold the market shares and are well known as Amgen Inc., AstraZeneca PLC, Bayer AG, Bristol-Myers Squibb Company, F. Hoffmann-La Roche Ltd., GlaxoSmithKline PLC, Johnson & Johnson, Merck & Co. Inc., Novartis AG, and Pfizer Inc.

Additional Benefits:

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

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