

Kidney Cancer Therapeutics and Diagnostics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2021 - 2029

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Report description:

The Kidney Cancer Therapeutics and Diagnostics Market size is estimated at USD 6.92 billion in 2024, and is expected to reach USD 8.78 billion by 2029, growing at a CAGR of 4.86% during the forecast period (2024-2029).

The COVID-19 pandemic affected healthcare systems and resulted in the interruption of usual care in many healthcare facilities, exposing vulnerable patients with cancer, including kidney cancer, to significant risks. For instance, as per the article published in November 2022, during the first COVID wave (weeks 9-22), the number of renal cell carcinoma (RCC) diagnoses decreased by 15%. The decline was most pronounced in weeks 9-40 in patients >70 years of age with stage 1 disease. Thus, during the COVID-19 pandemic, the market for kidney cancer therapeutics and diagnostics was severely impacted. However, as per the study published in the BMC Journal in December 2022, once COVID-19 had infected cancer patients, a number of genetic changes brought on by COVID-19 may have rendered the first treatment ineffective, increasing the challenge of treating cancer clinically. In accordance with the study's findings, the GINS1 gene is very sensitive to COVID-19 in all 11 forms of cancer, including those of the lung, stomach, liver, esophagus, thyroid, ovary, cervix, breast, colorectum, prostate, and kidney. Furthermore, the study detailed that there is a rational explanation regarding cancer patients infected with COVID-19 could develop a more severe condition since GINS1 is expressed more strongly in cancer tissues than in normal tissues. Thus, as per the analysis, such findings are anticipated to bolster the demand for diagnosis and therapeutics in kidney cancer patients along with new emerging strains of the SARS-CoV-2 virus globally, in turn boosting the market growth over the post-pandemic phase.

The market is primarily driven by the increase in the prevalence of kidney cancer and increased research and development expenditures from pharmaceutical companies. According to a report by the International Kidney Cancer Coalition in July 2021, each year, around 431,000 people worldwide are diagnosed with kidney cancer. Thus, with the growing prevalence of kidney cancer, it is expected that the demand for kidney cancer therapeutics and diagnostics is likely to increase over the forecast

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period. Additionally, product launches by the key market players will support the market expansion over the forecast period. For instance, in February 2021, Glenmark Pharma introduced SUTIB, a generic kidney cancer treatment, in India. Sunitinib, an oral multikinase inhibitor (MKI), is effective in treating individuals with gastrointestinal stromal tumors and advanced renal cell carcinoma. Similarly, in September 2021, MSN Labs launched Cabolong, a branded generic of Cabozantinib, for the treatment of renal cell carcinoma.

Moreover, funding for kidney cancer research increases the opportunities to develop a therapy for kidney cancer, which is anticipated to boost market growth over the forecast period. For instance, in September 2022, Weill Cornell Medicine was awarded a USD 1 million, three-year grant from the Department of Defense's Kidney Cancer Research Program to fund research on the role of the protein ATF4 in clear cell renal cell carcinoma (ccRCC), a form of kidney cancer. Similarly, in July 2022, Bristol-Myers Squibb announced the results of its Phase III trial of the company's Opdivo and Yervoy combination in renal cell carcinoma (RCC).

Thus, due to the rise in kidney diseases, increase in the funding of research in kidney disease, and surge in health care expenditure, the kidney cancer therapeutics and diagnostics market is anticipated to witness growth in the market over the forecast period. However, the high cost associated with the treatment and low success rate in clinical trials for cancer drugs may restrain market growth over the forecast period.

Kidney Cancer Therapeutics & Diagnostics Market Trends

Clear Cell RCC is Expected Witness a Growth in the Kidney Cancer Therapeutics and Diagnostics Market Over the Forecast Period

Clear cell renal cell carcinoma, or ccRCC, is a type of kidney cancer also called conventional renal cell carcinoma. Clear-cell renal cell carcinoma is named after how the tumor looks under the microscope. The cells in the tumor look clear, like bubbles. Clear-cell renal cell carcinoma is more common in adults than in children. Renal cell carcinoma makes up 2% to 6% of childhood and young adult kidney cancer cases. Patients with ccRCC may have pain or feel tired. Sometimes, patients do not have any noticeable symptoms. Symptoms can include blood in the urine, pain, weight loss, feeling tired, fever, and a lump on the side.

According to the study published in the Karger Journal in April 2022, high BIRC5 expression is a key indicator of ccRCC prognosis, making BIRC5 an excellent biomarker for predicting patient prognosis in ccRCC. BIRC5 is a promising biomarker for the early detection of ccRCC. Thus, the adoption of various techniques in the diagnosis of ccRCC cancer is expected to boost the market segment, as the availability of such techniques may help in the early diagnosis of ccRCC cancer.

In addition, growing research and development activity to identify the potential treatment option for ccRCC cancer is expected to boost segment growth. For instance, in August 2021, in a study from the University of Pennsylvania's Perelman School of Medicine, the researchers discovered that the health of these specific cancer cells and tumors is dependent on cholesterol and this receptor, while also demonstrating that medication that precisely targets the receptor could make the cancer cells unable to survive and propagate. The study also revealed that lowering cholesterol through the diet may help to slow the formation of ccRCC tumors. According to the researchers, future trials are likely to look into specific medicines and diets that can be utilized clinically to treat ccRCC.

Likewise, in November 2022, the U.S. FDA granted Fast Track Designation to Aravive, Inc.'s lead program, batiraxcept, for the treatment of patients with advanced or metastatic clear cell renal cell carcinoma (ccRCC) who have progressed after 1 or 2 prior lines of systemic therapy, including both immuno-oncology (IO)-based and vascular endothelial growth factor (VEGF)-based therapies.

Thus, the clear-cell renal cell carcinoma segment is predicted to grow throughout the forecast period due to the rise in renal

disorders and the increase in research and development activities relating to kidney disease.

North America is Anticipated to Witness a Growth in the Kidney Cancer Therapeutics and Diagnostics Market Over the Forecast Period

North America is anticipated to hold a significant share of the kidney cancer therapeutics and diagnostics market over the forecast period owing to major factors such as the increasing number of kidney cancer cases and product launches by the key market players. Other factors, such as increased R&D expenditures by pharmaceutical companies and increasing incidences of an aging population, are expected to contribute to the growth of the market in the forecast period.

According to the ACS 2022 update, approximately 79,000 new cases of kidney cancer are likely to be diagnosed in the United States by the end of 2022. Furthermore, as per the Canadian Cancer Society, it is estimated that by the end of 2022, 8,100 Canadians are likely to be diagnosed with kidney and renal pelvis cancer. Out of which, 5,400 men and 2,700 women are anticipated to be diagnosed with kidney and renal pelvis cancer in 2022. Additionally, according to the study published in the National Library of Medicine in May 2022, every year, around 64,000 kidney cancer cases are reported in the United States. The incidence is highest between the ages of 60 and 80. Thus, the growing prevalence of kidney cancer in the United States is expected to increase the demand for diagnosis and treatment, thereby boosting the market growth.

Furthermore, growing product launches by the key market players are anticipated to boost the market's growth. For instance, in November 2021, Merck received FDA approval for Pembrolizumab for the adjuvant treatment of patients with renal cell carcinoma (RCC) who are at intermediate-high or high risk of recurrence following nephrectomy or nephrectomy and resection of metastatic lesions.

As a result of the rise in renal diseases and the increase in kidney disease-related research & development activities, North America is anticipated to witness growth in the kidney cancer therapeutics and diagnostics market over the forecast period.

Kidney Cancer Therapeutics & Diagnostics Industry Overview

The kidney cancer therapeutics and diagnostics market is slightly consolidated in nature. There has been a presence of a considerable number of companies that are significantly contributing to the market growth. Product innovation and ongoing R&D activities to develop advanced technologies have helped boost the growth of the market. Some of the key players are Abbott Laboratories, Amgen Inc., Bayer AG, Bristol-Myers Squibb, F. Hoffmann-La Roche, Merck & Co., Inc., and others.

Additional Benefits:

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