

Unresectable Hepatocellular Carcinoma - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Unresectable Hepatocellular Carcinoma Market size is estimated at USD 2.01 billion in 2024, and is expected to reach USD 3.07 billion by 2029, growing at a CAGR of 8.84% during the forecast period (2024-2029).

The COVID-19 pandemic has significantly impacted the unresectable hepatocellular carcinoma market. As per a research study titled "Impacts of COVID-19 on Liver Cancers: During and after the Pandemic", published in the National Library of Medicine in May 2020, hepatocellular carcinoma (HCC) patients are more vulnerable to the effects of COVID-19 than other cancer patients as the hepatic injury caused by SARS-CoV-2 could complicate the existing hepatitis virus infection and cirrhosis. Further, barriers to accessing cancer drugs during the COVID-19 pandemic endangered the stability and integrity of pharmaceutical supply chains, thus limiting the supply of drugs across healthcare facilities. Thus, the COVID-19 pandemic has altered healthcare priorities, which may adversely impact HCC management.

The major factors fueling the market's growth are the high incidence rate of liver carcinoma and the advancement in new treatment options.

The high incidence rate of liver carcinoma is a major factor driving the market's growth. According to a September 2021 update by the Centers for Disease Control and Prevention, each year, about 24,500 men and 10,000 women in the United States get liver cancer, and about 18,600 men and 9,000 women die from the disease. As per the statistics, there is a significant rise in the patient pool, which is expected to boost the market's growth. Additionally, according to GLOBOCAN 2020, the estimated number of new liver cancer cases worldwide in 2020 was 906,000, and the number is expected to reach 1.40 million by 2040. Thus, the increasing incidence rate of liver cancer reflects the growing rate of unresectable hepatocellular carcinoma, which is augmenting the demand for unresectable HCC treatment.

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Moreover, advancements in new treatment options are boosting the market's growth. For instance, according to an article published in Karger Journal, in 2021, various phase 3 trials reported a clinical benefit for the tyrosine kinase inhibitors lenvatinib, regorafenib, and cabozantinib in HCC. Additionally, as per a 2022 update by The Regents of the University of California, 51 clinical trials are in progress for hepatocellular carcinoma treatment. As per an October 2021 published article titled "Hepatic Arterial Infusion Chemotherapy Is a Feasible Treatment Option for Hepatocellular Carcinoma: A New Update", hepatic arterial infusion chemotherapy (HAIC) has greater survival in patients with advanced HCC. Thus, the availability of advanced drugs in the treatment of hepatocellular carcinoma is expected to boost the market over the forecast period.

However, fewer diagnoses and poor efficacy of current therapeutic agents are major factors restraining the market's growth.

Unresectable Hepatocellular Carcinoma Market Trends

Chemotherapy Holds Significant Share in the Unresectable Hepatocellular Carcinoma Market

By treatment, the chemotherapy segment is expected to witness significant growth. The major factors fueling the segment's growth are the increasing prevalence of hepatocellular carcinoma, the growing number of drug approvals, and advancements in new treatment options.

For instance, as per a 2021 update by the American Society of Clinical Oncology (ASCO), chemoembolization is a type of chemotherapy treatment similar to hepatic arterial infusion. The same source also reported that drugs are injected into the hepatic artery during this procedure, and the flow of blood through the artery is blocked for a short time. Thus, the chemotherapy stays in the tumor for a longer period, making chemotherapy treatment more effective. Therefore, such factors are boosting the adoption of chemotherapy as a better treatment option for patients suffering from HCC, thereby contributing to the segment's growth.

Furthermore, a news article published in February 2022 detailed a study conducted at Tianjin Cancer Hospital in China. The researchers examined 35 patients with intermediate/advanced HCC at Tianjin Cancer Hospital. The study concluded that in patients with unresectable hepatocellular carcinoma (HCC), the most frequent kind of primary liver cancer, combining PD-1 immune checkpoint suppression with transarterial chemotherapy and Lenvima (lenvatinib) improved prognosis. Such factors increase the adoption of chemotherapy among the patient population, thus driving the segment's growth.

Thus, the factors mentioned above are anticipated to boost the segment's growth over the forecast period.

North America Dominates the Unresectable Hepatocellular Carcinoma Market

Within North America, the United States holds the major share of the market. Factors such as the increasing prevalence of liver cancer in the country, technological advancements in drug development, increasing R&D investments, and the growing geriatric population are expected to drive the US unresectable hepatocellular carcinoma market during the forecast period. According to data by GLOBOCAN 2020, the estimated number of liver and intrahepatic bile duct cancer cases in the country was 42,284 in 2020. The number is expected to reach 52,703 by 2040. Unresectable hepatocellular carcinoma is the most common type of liver cancer. The expected increase in cancer cases in the country may drive the market's growth.

Several market players are engaged in implementing strategic initiatives, thereby contributing to the market's growth. For instance, in February 2022, Eureka Therapeutics Inc., a clinical-stage biotechnology company developing novel T-cell therapies to treat solid tumors, reported that the US Food and Drug Administration (FDA) granted Orphan Drug Designation (ODD) to ET140203 and ECT204 for the treatment of hepatocellular carcinoma (HCC), the most common form of liver cancer. In January

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2020, AstraZeneca's durvalumab (Imfinzi) and tremelimumab were granted the US FDA Orphan Drug Designation to treat hepatocellular carcinoma (HCC).

Thus, due to the above-mentioned factors, the market is expected to grow significantly in the region over the forecast period.

Unresectable Hepatocellular Carcinoma Industry Overview

The unresectable hepatocellular carcinoma market is moderately competitive and consists of a few major players. Companies like AstraZeneca PLC, Bayer AG, Bristol-Myers Squibb Company, Celgene Corporation, Eisai Co. Ltd, F. Hoffmann-La Roche Ltd, Merck & Co. Inc., and Pfizer Inc. hold a substantial market share.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

- 1.1 Study Deliverables
- 1.2 Study Assumptions
- 1.3 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 High Incidence Rate of Liver Carcinoma
 - 4.2.2 Advancement in New Treatment Options
- 4.3 Market Restraints
 - 4.3.1 Less Diagnosis and Poor Efficacy of Current Therapeutic Agents
- 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 Treatment
 - 5.1.1 Chemotherapy
 - 5.1.2 Molecularly Targeted Therapy
 - 5.1.3 Immunotherapy
 - 5.1.4 Other Treatments
- 5.2 By End User

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- 5.2.1 Hospitals
- 5.2.2 Cancer Centers
- 5.2.3 Other End Users
- 5.3 By Geography
 - 5.3.1 North America
 - 5.3.1.1 United States
 - 5.3.1.2 Canada
 - 5.3.1.3 Mexico
 - 5.3.2 Europe
 - 5.3.2.1 Germany
 - 5.3.2.2 United Kingdom
 - 5.3.2.3 France
 - 5.3.2.4 Italy
 - 5.3.2.5 Spain
 - 5.3.2.6 Rest of Europe
 - 5.3.3 Asia-Pacific
 - 5.3.3.1 China
 - 5.3.3.2 Japan
 - 5.3.3.3 India
 - 5.3.3.4 Australia
 - 5.3.3.5 South Korea
 - 5.3.3.6 Rest of Asia-Pacific
 - 5.3.4 Middle-East and Africa
 - 5.3.4.1 GCC
 - 5.3.4.2 South Africa
 - 5.3.4.3 Rest of Middle-East and Africa
 - 5.3.5 South America
 - 5.3.5.1 Brazil
 - 5.3.5.2 Argentina
 - 5.3.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles
 - 6.1.1 Astrazeneca PLC
 - 6.1.2 Bayer AG
 - 6.1.3 Bristol-Myers-Squibb Company
 - 6.1.4 Celgene Corporation
 - 6.1.5 Eisai Co. Ltd
 - 6.1.6 F. Hoffmann-La Roche Ltd
 - 6.1.7 Merck & Co. Inc.
 - 6.1.8 Pfizer Inc.
 - 6.1.9 Chugai Pharmaceutical Co. Ltd
 - 6.1.10 Pharmaxis
 - 6.1.11 Eli Lilly
 - 6.1.12 BeiGene

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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