

Brain Cancer Market Assessment, By Drug [Carmustine, Cisplatin, Bevacizumab, Temozolomide, Belzutifan, Others], By Therapy [Chemotherapy, Targeted Therapy, Immunotherapy, Others], By Indication [Pituitary, Glioma, Meningioma, Others], By End-user [Hospitals, Cancer Centers, Diagnostic Laboratories], By Distribution Channel [Hospital Pharmacy, Retail Pharmacy, Online Pharmacy], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Global brain cancer market is projected to witness a CAGR of 10.03% during the forecast period 2024-2031, growing from USD 2.51 billion in 2023 to USD 5.39 billion in 2031F. The increasing prevalence of the disease in various regions across the globe is expected to boost the growth of the market.

As per the estimates of the American Cancer Society, approximately 25,400 malignant tumors of the spinal cord or brain have been diagnosed in the United States in 2023. Out of these diagnosed cases, 10,980 are expected to be diagnosed in females and 14,420 are expected to be diagnosed in males. It is estimated that roughly 18,760 people will die from spinal cord and brain tumors. The rising awareness about neurological diseases in both children and adults is providing lucrative growth opportunities to the market. The different risk factors that are attributed to an increased chance of developing brain tumors include exposure to viruses, allergens, infections, N-nitroso compounds, and head injuries and seizures.

Increasing efforts of various governments to combat the disease are supporting important research discoveries. Various governments are investing in researching new ways to treat, diagnose, and prevent brain cancer. For instance, the government of Canada is dedicated to the development of new treatment strategies by promoting scientific collaborations. The collaborations with organizations such as the Brain Tumor Foundation of Canada and the Brain Canada Foundation (BC) are aiding in maximizing

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the impact of research investments. A neurosurgeon-scientist at the University of Toronto and the University Health Network, with the help of brain cancer research funding was able to find new therapies for preventing high-risk surgical procedures and transform the clinical management of patients with brain tumors. Another partnership with the Canadian Cancer Society has united 10 research teams that aim at making life-changing breakthroughs in brain cancer.

Growing Research and Development Activities

The various research activities aimed at spinal cord and brain tumors are dedicated to reducing the different toxic effects associated with effective therapies, identifying the underlying cause of cancer, and determining novel treatments and delivery methods. For instance, in 2023, a team of researchers from the University of Texas at Dallas and UT Southwestern Medical Center developed a method to deliver medication through the blood-brain barrier, using gold nanoparticles. The technique showed positive results for the treatment of glioblastoma, a common form of brain cancer, in the clinical study. The drug delivery method relies on the co-delivery of medication with vessel-targeted gold nanoparticles, that are then injected into the bloodstream. In the experiment, paclitaxel was used by the researchers to conclude the chemotherapy drug for treating lung, ovarian, and breast cancers.

Increasing Prevalence of Disease in Both Children and Adults

According to the American Cancer Society, spinal cord and brain tumors are the second most common type of cancer in children. They account for approximately one out of four cases of cancer in children. Almost three out of four children diagnosed with brain tumors survive at least five years after receiving the diagnosis. Hence, various studies are being conducted to determine the effects of cancer-treating drugs on children, which is further leading to the brain cancer market growth.

For instance, the PIRATE study conducted by EpicentRx, Inc. aims to determine the side effects of RRx-001 in young adults and children when given together with temozolomide and irinotecan. The study aims to determine if the given combination is helpful for young adults and children with previously treated cancerous tumors.

North America is Expected to Account for Significant Market Share

North America is expected to dominate the market due to the growing prevalence of brain cancer in the United States and Canada and the increase in the emphasis on cancer research. According to the National Brain Tumor Society, approximately one million individuals are living with a brain tumor in America and 94,390 individuals are expected to receive a primary brain tumor diagnosis in 2023. The Canadian Cancer Society estimated that, in 2023, 3,200 Canadians will be diagnosed with spinal cord and brain cancer and nearly 2,500 Canadians will die amongst them. Due to the unique challenges presented by brain cancer, research and development activities are increasingly being conducted by various research institutions and market players. Currently, a study is being conducted by the University of Alabama in Birmingham to determine the safety and tolerability of novel gamma-delta T cell therapy for treating patients who recently received a diagnosis of glioblastoma.

Increasing Cases of Glioma Support Market Growth

According to the National Brain Tumor Society, glioblastoma accounts for 50.1% of all primary malignant brain tumors, and has more than 14,490 Americans, expected to receive a diagnosis of glioblastoma in 2023. According to an article published by researchers from MU School of Medicine and the University of Rochester, in May 2023, 6 out of every 100,000 people receive a diagnosis of glioma in the United States every year. Due to the increasing prevalence of glioma in different regions across the globe, research and development activities are increasing to find novel treatment solutions.

Various regulatory bodies such as the Food and Drug Administration (FDA) are providing fast-track designation to drugs that treat glioma. For instance, the FDA granted fast-track designation to the herpes simplex virus-1 (HSV-1) viral immunotherapy agent CAN-3110 as a treatment for enhancing the overall survival of patients suffering from recurrent high-grade glioma. Across all dosing levels, the findings supported the safety of CAN-3110 despite the presence of HSV1 ICP34.5 gene. CAN-3110 is a first in class oncolytic viral immunotherapy that is designed for targeting cancer cells expressing Nestin.

Hospital Pharmacies Expected to Witness Significant Growth

The longstanding trust associated with hospital pharmacies is bolstering the expansion of the segment. Drugs that are essential for treatment of brain tumor are prescribed after the receipt of diagnosis and often require hospital administration. Furthermore, the easy claim of health insurance policies across hospital pharmacies further encourages patients to purchase brain cancer-treating drugs from them. The convenience offered by hospital pharmacies coupled with the assurance of availability of quality products that are within the expiry period is further boosting the segment growth.

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On the contrary, online pharmacies are anticipated to witness significant expansion over the forecast period. It is due to the availability of a wide range of benefits offered by online pharmacies including fast delivery and shipping, privacy, and discount codes and coupons. The increasing practice of purchasing medicines from legitimate and verified online pharmacies across developed countries is supporting the expansion of the segment.

Future Market Scenario (2024 - 2031F)

-□Increasing research and development activities and supportive government initiatives are expected to support the growth of the market over the forecast period.

-□In 2023, a research team at Brigham and Women's Hospital tested and developed a novel approach for assessing the working of antitumor drugs for different patients. The scientists developed drug releasing microdevices that were used for testing several drugs, however only one of them was administered to the patients. Conducting further studies will aid in determining the effectiveness of microdevices in personalized cancer treatments.

-□Several studies are underway to determine the effects of various drugs on both adults and children.

-□A study being conducted by the University of Alabama at Birmingham is expected to determine the safety and tolerability of novel gamma-delta T cell therapy for treating patients who recently received a diagnosis of glioblastoma, projected to conclude by December 2024.

Key Players Landscape and Outlook

Key participants in the brain cancer market include F. Hoffmann-La Roche Ltd., Bayer AG, Bristol-Myers Squibb Company, EpicentRx, Inc., and Siemens Healthineer. The market is expected to witness significant growth owing to rising investments by major market players in research and development activities and strategic collaborations. In 2023, the partnership between Ever Fortune and medical equipment giants Siemens Healthineers and General Electric Company (GE) was announced. Following the collaboration with the medical equipment giants, Ever Fortune is expected to focus on its expansion in the Southeast Asian market and strengthen its cooperation with major companies.

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