

Europe Cancer Therapeutics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 70 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Europe Cancer Therapeutics Market Analysis

The Europe oncology drugs market size stands at USD 61.46 billion in 2025 and is forecast to reach USD 79.87 billion by 2030, expanding at a 5.38% CAGR. This steady trajectory reflects regulatory harmonization by the European Medicines Agency (EMA), precision-medicine expansion under the EU Beating Cancer Plan, and sustained R&D investment in leading economies such as Germany and France. Intensifying competition centers on antibody-drug conjugates and radioligand therapies, while biosimilar uptake accelerates cost containment efforts across public health systems. Cross-border CAR-T manufacturing, digital biomarker deployment, and a venture-capital surge in radiopharmaceutical start-ups further widen addressable demand. Cost pressures, divergent health-technology assessment (HTA) timelines, and nuclear-medicine infrastructure gaps remain the principal obstacles to timely patient access.

Europe Cancer Therapeutics Market Trends and Insights

Precision-oncology approvals post-EMA reforms

EMA modernization has accelerated precision-oncology pathways, with 28 oncology opinions in 2024 versus historical single-digit figures. Conditional marketing authorizations shortened time to market for biomarker-driven agents such as lazertinib, which reached European patients within 12 months of pivotal data read-out and delivered 23.7 months median progression-free survival against 16.6 months for comparator therapy. Companies now prioritizing real-world-evidence generation gain a durable

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

competitive edge, whereas developers reliant on legacy models face erosion in launch velocity. Harmonized procedures also reduce duplicative submissions, freeing capital for late-stage trials and life-cycle management.

Biosimilar oncology uptake lowering therapy costs

Europe's biosimilar penetration triggered double-digit volume growth across molecules such as trastuzumab and rituximab, driving price erosion beyond 40% in leading markets. Physician confidence broadened adoption after real-world equivalence studies, enabling payers to reallocate savings to innovative therapies. Originators respond by emphasizing superior clinical differentiation and bundled service offerings. Multi-source competition intensifies procurement pressure, favoring manufacturers with high-throughput biologics capacity and robust pharmacovigilance data packages.

Divergent HTA reimbursement timelines across EU-5

The W.A.I.T. indicator survey shows an average 531-day lag between EMA approval and patient availability across the five largest markets, reflecting heterogeneous evidence and pricing requirements. While the 2025 Joint Clinical Assessment regulation aims to align methodologies, transitional frictions may widen gaps as national agencies recalibrate value-frameworks. Larger pharmaceutical firms leverage multi-disciplinary market-access teams to navigate parallel submissions, whereas smaller innovators risk launch postponements and revenue shortfalls.

Other drivers and restraints analyzed in the detailed report include:

Biosimilar oncology uptake lowering therapy costs / Genomic screening roll-outs in EU cancer plans / Hospital capacity gap for nuclear-medicine-based therapies /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Chemotherapy retained a 42.35% share of the Europe oncology drugs market size in 2024, reflecting its entrenched role in combination regimens. Yet targeted therapy is forecast to post a 6.23% CAGR, propelled by HER2-low breast-cancer approvals and next-generation EGFR inhibitors that extend progression-free intervals. A maturing immunotherapy backbone increasingly pairs with precision inhibitors, enabling deeper responses across tumor types and elevating biomarker testing rates.

Increasing clinical-trial density underscores strategic emphasis on tumor-agnostic indications, with basket-study designs compressing development cycles. Biosimilar erosion in traditional cytotoxics accelerates revenue migration toward precision platforms, prompting legacy manufacturers to replenish pipelines via licensing or bolt-on acquisitions. The shift also reorients hospital formularies toward outpatient administration, reinforcing payer preference for cost-effective, biomarker-guided protocols.

Breast cancer dominated the Europe oncology drugs market size with 25.45% share in 2024, backed by entrenched screening programs and established treatment algorithms. However, lung cancer is slated for the fastest 6.89% CAGR through 2030 as first-line immunotherapy combinations and exon-20 insertion inhibitors unlock previously refractory segments.

Environmental policy tightening on smoking and air-quality metrics may gradually temper incidence, yet rapid molecular-diagnostic adoption broadens eligible patient pools for targeted regimens in the near term. Pharmaceutical companies thus prioritize portfolio depth across genomic subsets, balancing blockbuster volume in hormone-positive breast cancer with high-growth revenue in niche lung-cancer mutations.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

The Europe Oncology Drugs Market Report is Segmented by Therapy Type (Chemotherapy, Targeted Therapy, and More), Cancer Type (Breast Cancer, Lung Cancer, and More), Drug Class (PD-1/PD-L1 Inhibitors, Tyrosine Kinase Inhibitors, and More), Mode of Administration (Intravenous, Subcutaneous, and More), and Geography (Germany, United Kingdom, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Roche / Novartis / AstraZeneca / Pfizer / Bristol-Myers Squibb / Merck / Sanofi / Johnson & Johnson (Janssen Biotech) / GlaxoSmithKline / Bayer / Eli Lilly and Company / Amgen / Abbvie / Boehringer Ingelheim Int'l GmbH / Ipsen / Daiichi Sankyo / Takeda Pharmaceuticals / Servier SAS / Hikma Pharmaceuticals /

Additional Benefits:

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

Table of Contents:

- 1 Introduction
 - 1.1 Study Assumptions & Market Definition
 - 1.2 Scope of the Study
- 2 Research Methodology
- 3 Executive Summary
- 4 Market Landscape
 - 4.1 Market Overview
 - 4.2 Market Drivers
 - 4.2.1 Precision-oncology drug approvals surge post-EMA reforms
 - 4.2.2 Biosimilar oncology uptake lowering therapy costs
 - 4.2.3 Genomic screening roll-outs in EU27 national cancer plans
 - 4.2.4 Cross-border CAR-T manufacturing hubs in BeneluxA initiative
 - 4.2.5 VC funding boom for radioligand start-ups
 - 4.2.6 AI-driven trial-matching platforms shorten recruitment time
 - 4.3 Market Restraints
 - 4.3.1 Divergent HTA reimbursement timelines across EU-5
 - 4.3.2 Hospital capacity gap for nuclear-medicine-based therapies
 - 4.3.3 Oncology workforce shortages in CEE nations
 - 4.3.4 Rising supply-chain risk for critical API imports
 - 4.4 Value / Supply-Chain Analysis
 - 4.5 Regulatory Landscape
 - 4.6 Technological Outlook
 - 4.7 Porter's Five Forces
 - 4.7.1 Threat of New Entrants
 - 4.7.2 Bargaining Power of Buyers
 - 4.7.3 Bargaining Power of Suppliers
 - 4.7.4 Threat of Substitutes

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

4.7.5 Competitive Rivalry

5 Market Size & Growth Forecasts

5.1 By Therapy Type (Value)

5.1.1 Chemotherapy

5.1.2 Targeted Therapy

5.1.3 Immunotherapy

5.1.4 Hormonal Therapy

5.1.5 Others

5.2 By Cancer Type (Value)

5.2.1 Breast Cancer

5.2.2 Lung Cancer

5.2.3 Colorectal Cancer

5.2.4 Prostate Cancer

5.2.5 Hematologic Cancers

5.2.6 Other Cancers

5.3 By Drug Class (Value)

5.3.1 PD-1/PD-L1 Inhibitors

5.3.2 Tyrosine Kinase Inhibitors

5.3.3 CDK4/6 Inhibitors

5.3.4 Hormone Antagonists

5.3.5 Antibody-Drug Conjugates

5.3.6 Others

5.4 By Mode of Administration (Value)

5.4.1 Intravenous

5.4.2 Subcutaneous

5.4.3 Oral

5.4.4 Other Routes

5.4.5 Asia-Pacific

5.5 Europe

5.5.1 Germany

5.5.2 United Kingdom

5.5.3 France

5.5.4 Italy

5.5.5 Spain

5.5.6 Rest of Europe

6 Competitive Landscape

6.1 Market Concentration

6.2 Market Share Analysis

6.3 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)

6.3.1 F. Hoffmann-La Roche AG

6.3.2 Novartis AG

6.3.3 AstraZeneca PLC

6.3.4 Pfizer Inc.

6.3.5 Bristol-Myers Squibb Company

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.3.6 Merck & Co., Inc.
- 6.3.7 Sanofi S.A.
- 6.3.8 Johnson & Johnson (Janssen Biotech)
- 6.3.9 GlaxoSmithKline PLC
- 6.3.10 Bayer AG
- 6.3.11 Eli Lilly and Company
- 6.3.12 Amgen Inc.
- 6.3.13 AbbVie Inc.
- 6.3.14 Boehringer Ingelheim Int'l GmbH
- 6.3.15 Ipsen S.A.
- 6.3.16 Daiichi Sankyo Company Ltd.
- 6.3.17 Takeda Pharmaceutical Company Ltd.
- 6.3.18 Servier SAS
- 6.3.19 Hikma Pharmaceuticals PLC

7 Market Opportunities & Future Outlook

7.1 White-space & Unmet-Need Assessment

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Europe Cancer Therapeutics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 70 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-03"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

