GlobalData.

Merck & Co., Roche, and BMS Among Leading Players in the Non-Small Cell Lung Cancer Drugs Market | GlobalData Plc

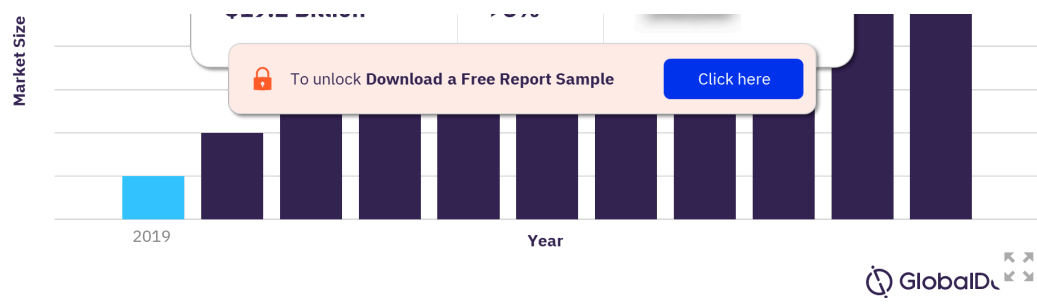
Merck & Co. currently holds the position as the market leader based on the success of its agent Keytruda in multiple patient populations and across the 8MM

July 20, 2022 09:45 ET | Source: GlobalData Plc Follow

Share

LONDON, July 20, 2022 (GLOBE NEWSWIRE) -- The "Non-Small Cell Lung Cancer (NSCLC) – Global Drug Forecast and Market Analysis to 2029" report offered by GlobalData provides an overview of NSCLC including epidemiology, etiology, pathophysiology, symptoms, diagnosis, and treatment guidelines. Additionally, the report analyses topline NSCLC market revenue, the annual cost of therapy, and major pipeline product sales in the forecast period.

The sales of NSCLC therapeutics totaled $19.2 billion in 2019 in the 8MM. The market is anticipated to experience growth at a CAGR of more than 5% by 2029. This growth is driven by the anticipated approval and launch of 29 pipeline therapies, in addition to label expansions of currently marketed therapies across the 8MM.



For more detailed statistics on NSCLC market sizing and forecast, download a sample report

NSCLC Drugs Market Drivers

GlobalData anticipates the launch of 29 pipeline products across the 8MM: abivertinib, sotorasib, amivantamab, AZD3759, bintrafusp alfa, BPI-7711, Cabometyx, camrelizumab, canakinumab, cemiplimab, CS-1001, D-0316, Enhertu, ensartinib, HS-10296, lazertinib, Lenvima, Lynparza, mobocertinib, Tedopi, pyrotinib, repotrectinib, SAR408701, savolitinib, sintilimab, sitravatinib, tiragolumab, tislelizumab, and toripalimab. Several of these agents have demonstrated impressive clinical efficacy and are positioned to tackle unmet clinical needs in the treatment of NSCLC. GlobalData anticipates the launch of these agents to be the major driver of market growth across the 8MM.

Furthermore, KOLs are enthusiastic about clinical data demonstrating the efficacy of the first-in-class agents expected to enter the pipeline and novel combinatorial regimens to boost the efficacy of IO approaches. The increasing use of targeted agents and IO will gradually replace the use of generic chemotherapies in the metastatic setting, and eventually in the earlier settings during the forecast period. These factors will act as a major driver of market growth.

For more insights on NSCLC market drivers and challenges, download a sample report

NSCLC Market - Unmet Needs and Opportunities Assessment

The treatment of NSCLC is characterized by a significant level of unmet need despite progress in recent years in the treatment and personalization of therapy options. Unmet needs include both environmental and clinical needs and have been

of checkpoint inhibitors in the first-line metastatic setting, have led to sustained and durable responses for patients with advanced disease.

For more insights on unmet needs and opportunities in the NSCLC market, download a sample report

NSCLC Market - Pipeline Assessment

The late-stage NSCLC pipeline demonstrates strong innovation in the field. A total of 29 agents are in late-stage clinical development (defined as a Phase III or potentially pivotal Phase II trial) and are expected to launch during the forecast period of 2019-2029 across the 8MM. Specific examples include novel agents targeting EGFR, ALK, and ROS1 mutations. In the immunotherapy space, there are also significant developments with several companies focusing their R&D strategies on developing combinatorial regimens of either targeted or immunomodulatory agents with checkpoint inhibitors, in the first-line or second-line settings. This strategy aims to further improve efficacy observed with ICIs with or without chemotherapy in patients with NSCLC and to steal market share in a particularly large and lucrative patient population.

For more insights on the NSCLC drugs pipeline and forecast, download a sample report

NSCLC Market - Competitive Landscape

The current marketed drug landscape in NSCLC includes a mix of targeted therapies, immunotherapies, and chemotherapies. In terms of classes of agents, TKIs and ICIs dominate the market. The NSCLC market can also be differentiated based on histology, as the squamous setting is largely dominated by ICIs compared to the non-squamous setting, which includes a mix of both TKIs and ICIs.

The current major players in NSCLC are Merck & Co., Roche, BMS, AstraZeneca, and Eli Lilly. Each player has either a single very successful agent or a successful portfolio in NSCLC. Specifically, each has developed and successfully

Leading Companies in the NSCLC Market

- Merck & Co.
- Roche
- BMS
- AstraZeneca
- Eli Lilly
- Novartis
- Pfizer
- Boehringer Ingelheim

To know more about leading companies in the NSCLC market, download a sample report

NSCLC Market Report Scope

- Overview of NSCLC including epidemiology, etiology, pathophysiology, symptoms, diagnosis, and treatment guidelines.
- Topline NSCLC market revenue, the annual cost of therapy, and major pipeline product sales in the forecast period.
- Key topics covered include current treatment and pipeline therapies, unmet needs and opportunities, and the drivers and barriers affecting NSCLC therapeutics sales in the 8MM.
- Pipeline analysis: Comprehensive data split across different phases, emerging novel trends under development, and detailed analysis of late-stage pipeline drugs (Phase III).
- Analysis of the current and future market competition in the global NSCLC market. Insightful review of the key industry drivers, restraints and challenges. Each trend is independently researched to provide a qualitative analysis of its implications.

Reasons to Buy

- Develop and design your in-licensing and out-licensing strategies, using a detailed overview of current pipeline products and technologies to identify companies with the most robust pipelines.
- Develop business strategies by understanding the trends shaping and driving the global NSCLC therapeutics market.
- Drive revenues by understanding the key trends, innovative products and technologies, market segments, and companies likely to impact the global NSCLC market in the future.
- Formulate effective sales and marketing strategies by understanding the competitive landscape and by analyzing the performance of various competitors.

from 2019-2029.

- Organize your sales and marketing efforts by identifying the market categories and segments that present maximum opportunities for consolidations, investments, and strategic partnerships.

Related Reports

- Histamine H4 Receptor (AXOR35 or G Protein Coupled Receptor 105 or GPRv53 or Pfi-013 or SP9144 or GPCR105 or HRH4) Drugs in Development by Therapy Areas and Indications, Stages, MoA, RoA, Molecule Type and Key Players, 2022 Update – **Click here**
- Nicotinamide Phosphoribosyltransferase (Visfatin or Pre B Cell Colony Enhancing Factor 1 or NAMPT or EC 2.4.2.12) Drugs in Development by Therapy Areas and Indications, Stages, MoA, RoA, Molecule Type and Key Players, 2022 Update – **Click here**
- Sjogrens Syndrome Marketed and Pipeline Drugs Assessment, Clinical Trials and Competitive Landscape – **Click here**
- Post-Polycythemia Vera Myelofibrosis (PPV-MF) Drugs in Development by Stages, Target, MoA, RoA, Molecule Type, and Key Players, 2022 Update – **Click here**
- Waldenstrom Macroglobulinemia (WM) Marketed and Pipeline Drugs Assessment, Clinical Trials and Competitive Landscape – **Click here**

NSCLC Drugs Market Overview

Market Size 2019	$19.2 billion
CAGR (2019-2029)	>5%
Leading Companies	Merck & Co., Roche, BMS, AstraZeneca, Eli Lilly, Novartis, Pfizer, Boehringer Ingelheim, and Others

FAQs

What was the NSCLC market size in 2019?

The NSCLC market size was valued at $19.2 billion in 2019.

What is the NSCLC market growth rate?

The NSCLC market is expected to grow at a CAGR of more than 5% during the forecast period.

Which are the leading companies in the NSCLC market?

The leading companies in the NSCLC market are Merck & Co., Roche, BMS, AstraZeneca, Eli Lilly, Novartis, Pfizer, and Boehringer Ingelheim.

Table of Contents

1.2 List of Figures

2 NSCLC: Executive Summary

2.1 The NSCLC Market Will Expand to $32.9B in 2029

2.2 Targeting Large Patient Populations in the First Line, with a Focus on Establishing New Actionable Mutations and Label Expansions for Premium Products into Earlier Lines

2.3 Opportunities Remain for Tackling Primary and Acquired Resistance to Targeted and IO Based Therapies

2.4 First-in-Class Approvals for Novel Actionable Mutations and Targeting Resistance

2.5 What Do Physicians Think?

3 Introduction

3.1 Catalyst

3.2 Related Reports

3.3 Upcoming Related Reports

4 Disease Overview

4.1 Etiology and Pathophysiology

4.1.1 Etiology

4.1.2 Pathophysiology

4.2 Classification or Staging Systems

5 Epidemiology

5.1 Disease Background

5.2 Risk Factors and Comorbidities

5.3 Global and Historical Trends

5.4 Forecast Methodology

5.4.1 Sources Used

5.4.2 Forecast Assumptions and Methods

5.4.5 Diagnosed Incident Cases of NSCLC by Histological Types

5.4.6 Mutations Among Diagnosed Incident Cases of Non-Squamous Cell Carcinoma and Squamous Cell Carcinoma

5.4.7 Five-Year Diagnosed Prevalent Cases of NSCLC

5.5 Epidemiological Forecast for NSCLC, 2019–2029

5.5.1 Diagnosed Incident Cases of NSCLC

5.5.2 Sex-Specific Diagnosed Incident Cases of NSCLC

5.5.3 Age-Specific Diagnosed Incident Cases of NSCLC

5.5.4 Diagnosed Incident Cases of NSCLC by Stage at Diagnosis

5.5.5 Diagnosed Incident Cases of NSCLC by Histological Type

5.5.6 Diagnosed Incident Cases of Non-Squamous Cell Carcinoma by Mutations: Genomic Biomarkers, EGFR and KRAS Mutations

5.5.7 Diagnosed Incident Cases of Squamous Cell Carcinoma by Mutations

5.5.8 Five-Year Diagnosed Prevalent Cases of NSCLC

5.6 Discussion

5.6.1 Epidemiological Forecast Insight

5.6.2 COVID-19 Impact

5.6.3 Limitations of the Analysis

5.6.4 Strengths of the Analysis

6 Disease Management

6.1 Diagnosis and Treatment Overview

6.2 US

6.5 China

7 Competitive Assessment

7.1 Overview

8 Unmet Needs and Opportunity Assessment

8.1 Overview

8.2 Increased Education, Application, and Refinement of Comprehensive Molecular Testing

8.3 Primary and Acquired Resistance to Immunotherapy

8.4 Personalized Approaches to Tackling Resistance

8.5 Improving Curative Options and Patient Outcomes for Those Without Actionable Mutations

9 Pipeline Assessment

9.1 Overview

9.2 Promising Drugs in Clinical Development

10 Current and Future Players

10.1 Overview

10.2 Trends in Corporate Strategy

10.3 Merck & Co.

10.4 AstraZeneca

10.5 Roche

10.6 Eli Lilly

10.7 BMS

10.8 Pfizer

10.9 Boehringer Ingelheim

10.10 Novartis

10.11 Future players

11 Market Outlook

11.1.2 Drivers and Barriers – Global Issues

11.2 5EU

11.2.1 Forecast

11.2.2 Key Events

11.2.3 Drivers and Barriers

11.3 Japan

11.3.1 Forecast

11.3.2 Key Events

11.3.3 Drivers and Barriers

11.4 US

11.4.1 Forecast

11.4.2 Key Events

11.4.3 Drivers and Barriers

11.5 China

11.5.1 Forecast

11.5.2 Key Events

11.5.3 Drivers and Barriers

12 Appendix

12.1 Bibliography

12.2 Abbreviations

12.3 Methodology

12.3.1 Forecasting Methodology

12.3.2 Diagnosed Patients

12.3.3 Percent Drug-Treated Patients

12.3.4 Drugs Included in Each Therapeutic Class

12.3.5 Launch and Patent Expiry Dates

12.3.8 Generic Erosion

12.3.9 Pricing of Pipeline Agents

12.4 Primary Research – KOLs Interviewed for This Report

12.4.1 KOLs

12.5 Primary Research – Prescriber Survey

12.6 About the Authors

12.6.1 Analyst

12.6.2 Therapy Area Director

12.6.3 Epidemiologist

12.6.4 Managing Epidemiologist

12.6.5 Global Director of Therapy Analysis and Epidemiology

12.6.6 Global Head and EVP of Healthcare Operations and Strategy

12.7 About GlobalData

12.8 Contact Us

12.9 Disclaimer

About GlobalData

GlobalData is a leading provider of data, analytics, and insights on the world's largest industries. In an increasingly fast-moving, complex, and uncertain world, it has never been harder for organizations and decision makers to predict and navigate the future. This is why GlobalData's mission is to help our clients to decode the future and profit from faster, more informed decisions. As a leading information services company, thousands of clients rely on GlobalData for trusted, timely, and actionable intelligence. Our solutions are designed to provide a daily edge to professionals within corporations, financial institutions, professional services, and government agencies.

Media Contacts

mark.jephcott@globaldata.com

cc: pr@globaldata.com

+44 (0)207 936 6400

Tags

Non-Small Cell Lung Cancer | NSCLC Market Size | NSCLC Market Growth | NSCLC Drugs Market Forecast | NSCLC Drugs Pipeline

Related Links

- GlobalData Report Store
- GlobalData Pharmaceuticals Market Reports

Explore

[Don't Run Out the Clock on Food Safety this Super ...]

January 27, 2025 14:51 ET

[How Blocscale Launchpad on XRP will Accelerate Inn...]

January 27, 2025 14:29 ET

GlobeNewswire by notified

About Us

GlobeNewswire is one of the world's largest newswire distribution networks, specializing in the delivery of corporate press releases, financial disclosures and multimedia content to media, investors, and consumers worldwide.

Global News

- English
- Français
- Deutsch

Newswire Distribution Network & Management

• Notified