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Non-Small Cell Lung Cancer treatment market to touch $7.9 bn by 2020'

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Singapore: Global Non-Small Cell Lung Cancer (NSCLC) treatment market value will increase from USD5.1 billion in 2013 to slightly over USD7.9 billion by 2020, expanding at a Compound Annual Growth Rate (CAGR) of 6.6 percent, according to business intelligence provider GBI Research.

According to the report, the growth will be driven primarily by the introduction of numerous premium therapies, particularly in second-line and squamous cell treatment settings, which either replace or combine with generic chemotherapies.

Other key drivers will be the increased uptake of currently marketed therapies, such as Gilotrif, and the lack of marked drug patent expirations until the end of the forecast period.

Mr Joshua Libberton, analyst, GBI Research, says, "There will be numerous new drug market entries by 2020, and while some will only have a low impact in crowded sectors, other new approvals will benefit patient subpopulations that are untreated by targeted therapies.Ã?Â Most notably, the squamous cell patient population, which currently relies on generic chemotherapy regimens only, will have access to immunotherapies such as Yervoy (ipilimumab), necitumumab and nivolumab."

Mr Libberton adds that while some of these drugs' safety profiles are a concern, they have clinically demonstrated improvements or non-inferiority to the efficacy of current segment leaders. Therefore, while GBI Research forecasts that these drugs are unlikely to dominate the market and replace chemotherapy, they will offer suitable alternatives and help to diversify treatment options.

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Despite considerable growth through to 2020, the report states that the NSCLC market's upcoming patent cliff will mean limited further expansion.

Mr Libberton explains, "Over the forecast period, the market environment will not allow premium entrants to be offset by the availability of efficacious generics. As treatment quality improves, physicians will be expected to prescribe expensive targeted therapies over generic chemotherapy options. However, leading drugs Avastin and Tarceva will lose patent protection in 2019 and 2020, respectively, followed by Alimta in 2021, all of which will hinder future market growth."