

# GLOBAL **BREAST** CANCER



THERAPEUTICS MARKET  
ANALYSIS, **2022-2030**

**insights** **10**

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# Overview

The Global Breast Cancer Therapeutics Market is projected to grow from **\$18.2 Bn** in 2022 to **\$48.0 Bn** by 2030, registering a CAGR of **12.9%** during the forecast period of 2022 - 2030.

Breast cancer is the second most common cancer in women worldwide, after skin cancer. The global breast cancer therapeutics market is a rapidly growing market and is expected to continue to grow in the coming years.

The market for breast cancer therapeutics is driven by a number of factors, including the increasing prevalence of breast cancer, the development of new and innovative drugs, and the growing demand for personalized medicine. The market is also benefiting from several initiatives and campaigns to raise awareness about breast cancer and the importance of early detection and treatment.

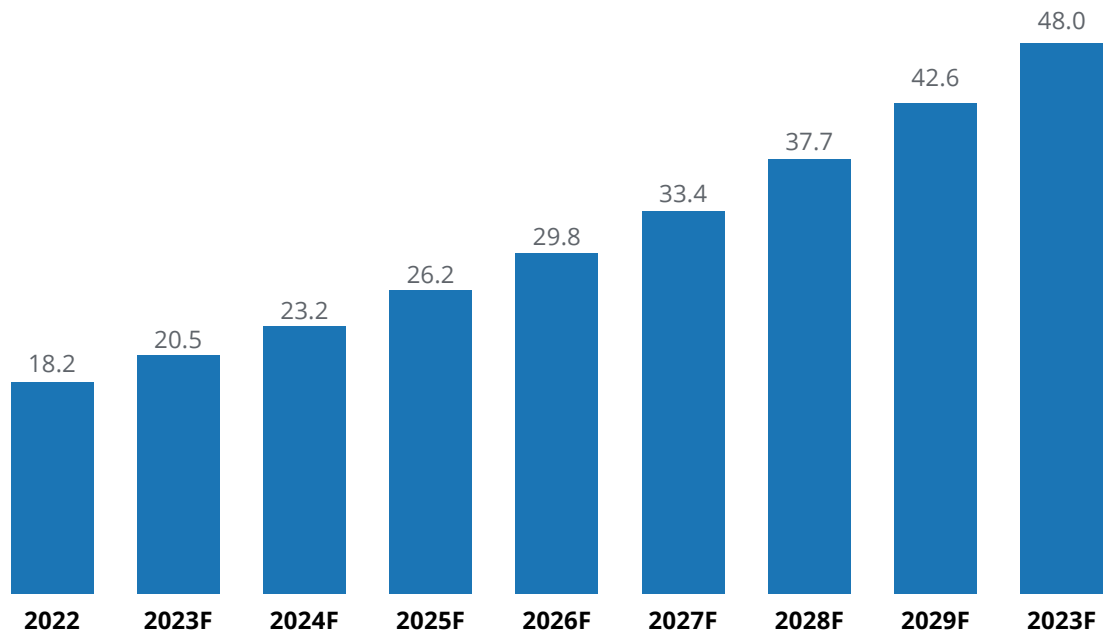
Some of the key players in the breast cancer therapeutics market include AstraZeneca, Roche, Pfizer, Novartis, and Eli Lilly. These companies are investing heavily in research and development to develop new treatments and improve existing ones. They are also working to improve patient access to breast cancer treatments by expanding their distribution networks and working with healthcare providers to improve diagnosis and treatment.

The breast cancer therapeutics market is segmented by type of therapy, including chemotherapy, targeted therapy, hormonal therapy, and others. The market is also segmented by types, distribution channels and regions.

Overall, the global breast cancer therapeutics market is expected to continue to grow at a rapid pace in the coming years, driven by increasing demand for effective treatments and ongoing investment in research and development.

## Global Breast Cancer Therapeutics Market (in \$ Bn)

Market is forecast to grow at a CAGR of 12.9%





# What is the Prevalence of **Breast Cancer** in the World?

With **1 in 8** cancer diagnoses worldwide, breast cancer is the most frequently diagnosed cancer kind. Each year, there are more than **2.3 Mn new instances** of breast cancer in the world, and there were also approximately 685,000 deaths from this illness, with significant regional variances between different nations and global areas. Breast cancer is the primary or secondary cause of mortality for women from cancer in **95%** of the world's nations. However, there are significant disparities in breast cancer survival between and within nations. Nearly **80%** of breast and cervical cancer fatalities take place in low- and middle-income nations.

The most significant risk factor is age, and the oldest females have the highest age-specific incidence rates. Less than one in five women with breast cancer is diagnosed before the age of 50 in the UK, while more than one-third of cases affect women beyond the age of 70. In contrast, more than half of breast cancer cases in women under 50 years old occur in less developed nations.

These disparities in breast cancer incidence and survival are likely due to a number of factors, including access to healthcare, screening programs, and awareness of the signs and symptoms of breast cancer. In many low- and middle-income countries, women do not have regular access to healthcare, and screening programs for breast cancer are not widely available. As a result, breast cancer is often diagnosed at a later stage, when it is more difficult to treat and less likely to be cured.


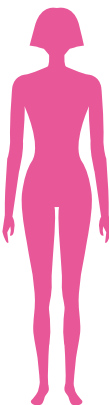
### Estimated new cancer cases and deaths by sex, US, 2023

Cancer Site	Estimated New Cases			Estimated Deaths		
	Both Sexes	Male	Female	Both Sexes	Male	Female
All sites	1,958,310	1,010,310	948,000	609,820	322,080	287,740
<b>Breast</b>	300,590	2800	297,790	43,700	530	43,170
<b>Oral cavity &amp; pharynx</b>	54,540	39,290	15,250	11,580	8140	3440
Tongue	18,040	13,180	4860	2940	1950	990
Mouth	14,820	8680	6140	3090	1870	1220
Pharynx	20,070	16,340	3730	4140	3260	880
Other oral cavity	1610	1090	520	1410	1060	350
<b>Digestive system</b>	348,840	194,980	153,860	172,010	99,350	72,660
Esophagus	21,560	17,030	4530	16,120	12,920	3200
Stomach	26,500	15,930	10,570	11,130	6690	4440
Small intestine	12,070	6580	5490	2070	1170	900
Colon & rectum	153,020	81,860	71,160	52,550	28,470	24,080
Colon	106,970	54,420	52,550	0	0	0
Rectum	46,050	27,440	18,610	0	0	0
Anus, anal canal, & anorectum	9760	3180	6580	1870	860	1010
Liver & intrahepatic bile duct	41,210	27,980	13,230	29,380	19,000	10,380
Gallbladder & other biliary	12,220	5750	6470	4510	1900	2610
Pancreas	64,050	33,130	30,920	50,550	26,620	23,930
Other digestive organs	8450	3540	4910	3830	1720	2110
<b>Respiratory system</b>	256,290	131,150	125,140	132,330	71,170	61,160
Larynx	12,380	9900	2480	3820	3070	750
Lung & bronchus	238,340	117,550	120,790	127,070	67,160	59,910
Other respiratory organs	5570	3700	1870	1440	940	500
<b>Bones &amp; joints</b>	3970	2160	1810	2140	1200	940
<b>Soft tissue (including heart)</b>	13,400	7400	6000	5140	2720	2420
<b>Skin (excluding basal &amp; squamous)</b>	104,930	62,810	42,120	12,470	8480	3990
Melanoma of the skin	97,610	58,120	39,490	7990	5420	2570
Other nonepithelial skin	7320	4690	2630	4480	3060	1420
<b>Genital system</b>	414,350	299,540	114,810	69,660	35,640	34,020


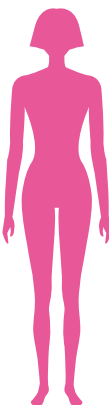
Uterine cervix	13,960	0	13,960	4310	0	4310
Uterine corpus	66,200	0	66,200	13,030	0	13,030
Ovary	19,710	0	19,710	13,270	0	13,270
Vulva	6470	0	6470	1670	0	1670
Vagina & other female genital	8470	0	8470	1740	0	1740
Prostate	288,300	288,300	0	34,700	34,700	0
Testis	9190	9190	0	470	470	0
Penis & other male genital	2050	2050	0	470	470	0
Urinary system	168,560	117,590	50,970	32,590	22,680	9910
Urinary bladder	82,290	62,420	19,870	16,710	12,160	4550
Kidney & renal pelvis	81,800	52,360	29,440	14,890	9920	4970
Ureter & other urinary organs	4470	2810	1660	990	600	390
Eye & orbit	3490	1900	1590	430	240	190
Brain & other nervous system	24,810	14,280	10,530	18,990	11,020	7970
Endocrine system	47,230	14,340	32,890	3240	1560	1680
Thyroid	43,720	12,540	31,180	2120	970	1150
Other endocrine	3510	1800	1710	1120	590	530
<b>Lymphoma</b>	89,380	49,730	39,650	21,080	12,320	8760
Hodgkin lymphoma	8830	4850	3980	900	540	360
Non-Hodgkin lymphoma	80,550	44,880	35,670	20,180	11,780	8400
<b>Myeloma</b>	35,730	19,860	15,870	12,590	7000	5590
<b>Leukemia</b>	59,610	35,670	23,940	23,710	13,900	9810
Acute lymphocytic leukemia	6540	3660	2880	1390	700	690
Chronic lymphocytic leukemia	18,740	12,130	6610	4490	2830	1660
Acute myeloid leukemia	20,380	11,410	8970	11,310	6440	4870
Chronic myeloid leukemia	8930	5190	3740	1310	780	530
Other leukemia	5020	3280	1740	5210	3150	2060
<b>Other &amp; unspecified primary sites</b>	32,590	16,810	15,780	48,160	26,130	22,030

Depicts The Most Common Cancers Diagnosed in Men & Women In 2023

Estimated New Cases

			Males	Females			
Prostate	288,300	29%			Breast	297,790	31%
Lung & bronchus	117,550	12%			Lung & bronchus	120,790	13%
Colon & rectum	81,860	8%			Colon & rectum	71,160	8%
Urinary bladder	62,420	6%			Uterine corpus	66,200	7%
Melanoma of the skin	58,120	6%			Melanoma of the skin	39,490	4%
Kidney & renal pelvis	52,360	5%			Non-Hodgkin lymphoma	35,670	4%
Non-Godgkin lymphoma	44,880	4%			Thyroid	31,180	3%
Oral cavity & pharynx	39,290	4%			Pancreas	30,920	3%
Leukemia	35,670	4%			Kidney & renal pelvis	29,440	3%
Pancreas	33,130	3%			Leukemia	23,940	3%
All sites	1,010,310	100%			All Sites	948,000	100%

Estimated Deaths

			Males	Females			
Lung & bronchus	67,160	21%			Lung & bronchus	59,910	21%
Prostate	34,700	11%			Breast	43,170	15%
Colon & rectum	28,470	9%			Colon & rectum	24,080	8%
Pancreas	26,620	8%			Pancreas	23,930	8%
Liver & intrahepatic bile duct	19,000	6%			Ovary	13,270	5%
Leukemia	13,900	4%			Uterine corpus	13,030	5%
Esophagus	12,920	4%			Liver & intrahepatic bile duct	10,380	4%
Urinary bladder	12,160	4%			Leukemia	9,810	3%
Non-Hodgkin lymphoma	11,780	4%			Non-Hodgkin lymphoma	8,400	3%
Brain & other nervous system	11,020	3%			Brain & other nervous system	7,970	3%
All sites	322,080	100%			All sites	287,740	100%

Nearly half (48%) of all incident instances of cancer in males are for the prostate, lung and bronchus (hereafter lung), and colorectal cancers (CRCs), with **29%** of diagnoses coming from prostate cancer alone.

Breast cancer alone accounts for **31%** of all cancer diagnoses in women, whereas lung cancer, CRC, and breast cancer together account for **52%** of all new diagnoses.



## Types of Breast Cancer?

There are several types of breast cancer, which are characterized based on the specific cells and tissues where the cancerous growth originates. The most common types of breast cancer are:



- Invasive Ductal Carcinoma (IDC)
- Ductal Carcinoma in Situ (DCIS)
- Invasive Lobular Carcinoma (ILC)
- Triple-negative Breast Cancer (TNBC)
- Metastatic Breast Cancer
- Tubular Breast Cancer
- Mucinous Breast Cancer
- Inflammatory Breast Cancer (IBC)
- Medullary Breast Cancer



## Ductal Carcinoma in Situ (DCIS):

DCIS is a non-invasive form of breast cancer that develops in the milk ducts of the breast. It is considered a pre-cancerous condition, as the abnormal cells are confined to the ducts and have not spread to nearby tissue.

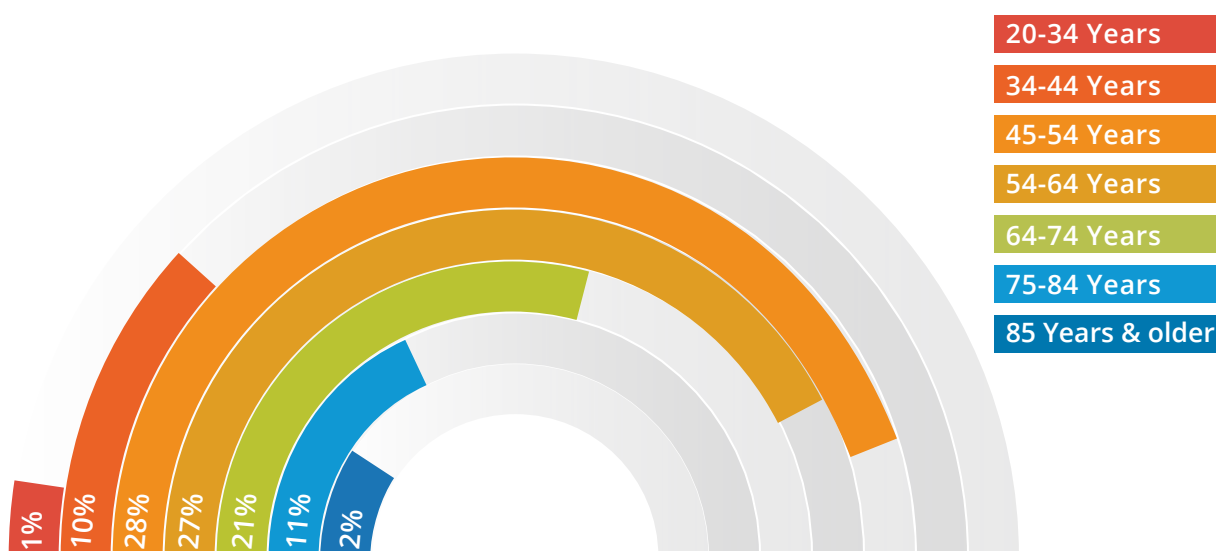
In the US now, DCIS accounts for **20% to 25%** of breast cancer diagnoses. This has increased along with the introduction of screening mammography because a sizable portion of DCIS is initially discovered on screening mammography. DCIS made up fewer than **5%** of newly diagnosed breast cancers during the pre-screening mammography period.

### Treatments available for Ductal Carcinoma in Situ (DCIS):

- Breast-conserving surgery (BCS)
- Mastectomy
- Hormone therapy after breast surgery

### Distribution of new DCIS type breast cancer cases in the US

BY age group



## Invasive Ductal Carcinoma (IDC):

IDC is the most common type of breast cancer, accounting for approximately 80% of all cases. It begins in the milk ducts of the breast but then invades the surrounding breast tissue.

### Treatment for invasive ductal carcinoma

Invasive ductal carcinoma may be treated with:

- Surgery:
- Radiation Therapy:
- Chemotherapy:
- Hormonal Therapy
- Targeted Therapy
- Immunotherapy

### Estimated New Invasive Breast Cancer Cases among Women by Age, US, 2019

Age	Numbers	%
<40	11,870	4
40-49	37,150	14
50-59	61,560	23
60-69	74,820	28
70-79	52,810	20
79<	30,390	11

### Invasive Lobular Carcinoma (ILC):

ILC originates in the lobules of the breast, which produce milk. It is less common than IDC, accounting for about **10-15%** of all breast cancers. Treatment options may include surgery, radiation therapy, chemotherapy, and hormonal therapy.

### Inflammatory Breast Cancer (IBC):

IBC is a rare and aggressive form of breast cancer that typically presents as a red, swollen, and warm breast. It occurs when cancer cells block the lymphatic vessels in the skin of the breast. Treatment for IBC usually involves a combination of different therapies, including Chemotherapy, Surgery, Radiation therapy, Targeted therapy, and Hormone therapy.

### Triple-negative Breast Cancer (TNBC):

TNBC is a type of breast cancer that tests negative for estrogen receptors, progesterone receptors, and HER2/neu. This means that the cancer does not respond to hormonal therapy or targeted therapies that are effective for other types of breast cancer. Treatment options may include surgery, radiation therapy, chemotherapy, and targeted therapy.

### Lobular Carcinoma in Situ (LCIS):

When abnormal cells are discovered in the breast lobules, it is known as lobular carcinoma in situ (LCIS). The breast tissue around the lobules is not affected by the atypical cells.

### Metastatic Breast Cancer:

Stage 4 breast cancer sometimes refers to metastatic breast cancer. Other body parts are now affected by the malignancy. Usually, the liver, bones, brain, and lungs are included in this.

There are other types that are less commonly seen-

## Medullary Carcinoma:

Medullary carcinoma accounts for **3-5%** of all breast cancer types. While the tumour frequently appears on mammography, it is not always felt as a bump. It can occasionally resemble a spongy breast tissue alteration.

## Tubular Carcinoma:

Tubular carcinoma cells, which account for around **2%** of all breast cancer diagnoses, have a recognisable tubular form. A clump of cells that can feel more like a spongy patch of breast tissue than a lump is typically discovered by a mammography. This particular kind of breast cancer typically affects women over the age of 50 and responds favourably to hormone therapy.

## Mucinous Carcinoma (Colloid):

A percentage of breast tumours between **1% and 2%** is mucinous carcinomas. Mucus production and poorly defined cells are the major characteristics that set them apart from one another. It typically has a good prognosis as well.

## Paget Disease of The Breast or Nipple:

A uncommon kind of cancer, breast Paget disease affects the skin of the nipple and frequently the areola, the darker circle of skin surrounding the nipple. Most persons with Paget disease that is visible on the nipple also have one or more tumours inside the same breast, which are often either invasive breast cancer or ductal carcinoma in situ (1–3). The initial signs of Paget illness are usually misdiagnosed because they are easily mistaken for more widespread skin disorders that affect the nipple. The prognosis for Paget disease, like all breast cancers, depends on a number of variables, such as the existence or absence of invasive malignancy and whether or not it has spread to neighbouring lymph nodes.



# What are the treatment options for **Breast Cancer**?

The treatment of breast cancer has made remarkable strides in recent years, offering a beacon of hope to those affected by this pervasive disease. Breast cancer treatment is not a one-size-fits-all approach but rather a finely tuned orchestra of therapies tailored to the specific type, stage, and individual characteristics of the cancer. From surgical procedures designed to remove or reshape affected breast tissue to targeted therapies aimed at disrupting the molecular mechanisms of cancer growth, the landscape of breast cancer treatment is as diverse as it is dynamic.

This comprehensive approach encompasses the traditional pillars of surgery, chemotherapy, and radiation therapy, as well as the latest innovations in immunotherapy and precision medicine. With a better understanding of these multifaceted treatment options, patients and healthcare providers alike can navigate the complex journey towards defeating breast cancer with increased confidence and optimism.

## Drugs Approved to Prevent Breast Cancer

- Evista (Raloxifene Hydrochloride)
- Raloxifene Hydrochloride
- Soltamox (Tamoxifen Citrate)
- Tamoxifen Citrate

## Drugs Approved to Treat Breast Cancer

- Abemaciclib
- Abraxane (Paclitaxel Albumin-stabilized Nanoparticle Formulation)
- Ado-Trastuzumab Emtansine
- Afinitor (Everolimus)
- Afinitor Disperz (Everolimus)
- Alpelisib
- Anastrozole
- Aredia (Pamidronate Disodium)
- Arimidex (Anastrozole)
- Aromasin (Exemestane)
- Capecitabine
- Cyclophosphamide
- Docetaxel
- Doxorubicin Hydrochloride
- Elacestrant Dihydrochloride
- Ellence (Epirubicin Hydrochloride)
- Enhertu (Fam-Trastuzumab Deruxtecan-nx-ki)
- Epirubicin Hydrochloride
- Eribulin Mesylate
- Everolimus
- Exemestane
- 5-FU (Fluorouracil Injection)
- Fam-Trastuzumab Deruxtecan-nxki
- Fareston (Toremifene)
- Faslodex (Fulvestrant)
- Femara (Letrozole)
- Fluorouracil Injection
- Fulvestrant
- Gemcitabine Hydrochloride
- Gemzar (Gemcitabine Hydrochloride)
- Goserelin Acetate
- Halaven (Eribulin Mesylate)
- Herceptin Hylecta (Trastuzumab and Hyaluronidase-oysk)
- Herceptin (Trastuzumab)
- Ibrance (Palbociclib)
- Infugem (Gemcitabine Hydrochloride)
- Ixabepilone
- Ixempra (Ixabepilone)
- Kadcyla (Ado-Trastuzumab Emtansine)
- Keytruda (Pembrolizumab)
- Kisqali (Ribociclib)
- Lapatinib Ditosylate
- Letrozole
- Lynparza (Olaparib)
- Margenza (Margetuximab-cmkb)
- Margetuximab-cmkb
- Megestrol Acetate
- Methotrexate Sodium
- Neratinib Maleate
- Nerlynx (Neratinib Maleate)
- Olaparib
- Orserdu (Elacestrant Dihydrochloride)
- Paclitaxel
- Paclitaxel Albumin-stabilized Nanoparticle Formulation
- Palbociclib
- Pamidronate Disodium
- Pembrolizumab
- Perjeta (Pertuzumab)
- Pertuzumab
- Pertuzumab, Trastuzumab, and Hyaluronidase-zzxf
- Phesgo (Pertuzumab, Trastuzumab, and Hyaluronidase-zzxf)
- Piqray (Alpelisib)
- Ribociclib
- Sacituzumab Govitecan-hziy
- Soltamox (Tamoxifen Citrate)
- Talazoparib Tosylate
- Talzenna (Talazoparib Tosylate)
- Tamoxifen Citrate
- Taxotere (Docetaxel)
- Tecentriq (Atezolizumab)
- Tepadina (Thiotepa)
- Thiotepa
- Toremifene
- Trastuzumab
- Trastuzumab and Hyaluronidase-oysk
- Trexall (Methotrexate Sodium)
- Trodelvy (Sacituzumab Govitecan-hziy)
- Tucatinib
- Tukysa (Tucatinib)
- Tykerb (Lapatinib Ditosylate)
- Verzenio (Abemaciclib)
- Vinblastine Sulfate
- Xeloda (Capecitabine)
- Zoladex (Goserelin Acetate)

## Drug Combinations Used in Breast Cancer

- AC
- AC-T
- CAF
- CMF
- FEC
- TAC

### Below is a summary of some of the drugs commonly used to treat breast cancer:

- **Hormone therapy:** This type of therapy is used for hormone receptor-positive breast cancers and includes drugs that block the effects of estrogen on the cancer cells. Examples of hormone therapy drugs include tamoxifen, aromatase inhibitors (such as letrozole, anastrozole, and exemestane), and fulvestrant.
- **Chemotherapy:** Chemotherapy is a systemic treatment that can be used to treat various types and stages of breast cancer. Examples of chemotherapy drugs used to treat breast cancer include taxanes (such as paclitaxel and docetaxel), anthracyclines (such as doxorubicin and epirubicin), and cyclophosphamide.
- **Targeted therapy:** Targeted therapy drugs are designed to attack specific proteins or genes in cancer cells. Examples of targeted therapy drugs used to treat breast cancer include trastuzumab, pertuzumab, lapatinib, neratinib, and everolimus.
- **Immunotherapy:** Immunotherapy drugs work by stimulating the body's immune system to recognize and attack cancer cells. For breast cancer, the immunotherapy drug atezolizumab is sometimes used in combination with chemotherapy for triple-negative breast cancer that is PD-L1 positive.
- **PARP inhibitors:** PARP inhibitors are a type of targeted therapy drug that work by blocking an enzyme involved in DNA repair. These drugs are used to treat BRCA-mutated breast cancer and include olaparib, talazoparib, and rucaparib.
- **Bisphosphonates and denosumab:** These drugs are used to help prevent bone loss and reduce the risk of bone metastases in breast cancer patients. Examples of bisphosphonates include zoledronic acid and pamidronate, while denosumab is a monoclonal antibody.

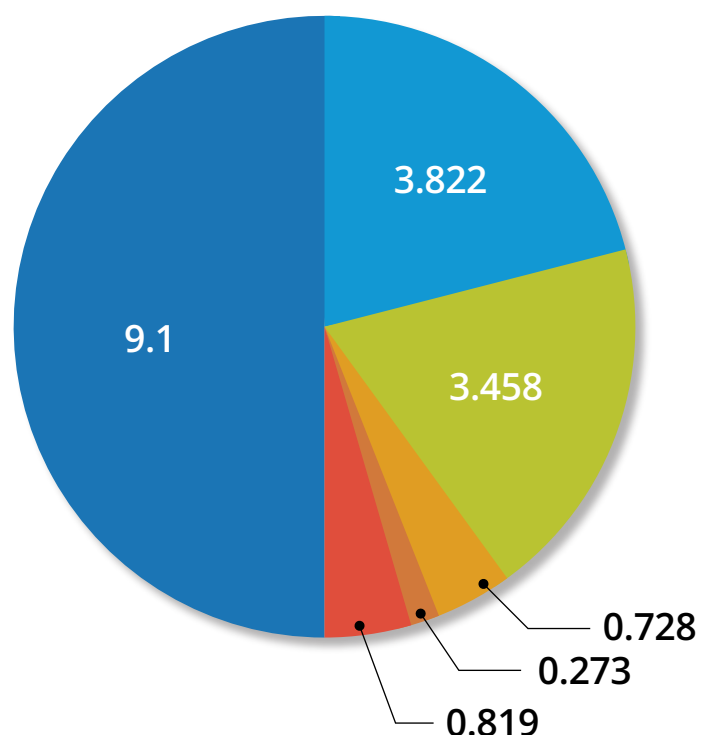


How big is the market for **breast cancer** treatments, & what are the key trends?

### Market Size and Key Findings

Breast Cancer Therapeutics Market Size, By Region (in \$ Bn)

- APAC
- Europe
- Middle East
- Africa
- Latin America
- North America



## Regional Analysis

The Global Breast Cancer Therapeutics Market is categorized into five regions based on geography: North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. North America accounted for the largest share of the global breast cancer drugs market in 2022 and is expected to remain dominant during the forecast period. This growth can be attributed to the presence of well-established corporations in the area, leading to the introduction of new treatments. Other contributing factors include the high incidence of breast cancer, a rising number of R&D clinical trials for breast cancer therapies, and increasing acceptance of cutting-edge medicines.

For instance, the American Cancer Society predicted that there would be about 276,480 new cases of invasive breast cancer in women in the United States in 2020.

Due to the rising incidence of breast cancer and increased use of cutting-edge therapies in the region, Europe is anticipated to be the second-most prominent region throughout the projection period. For instance, female breast cancer is the most prevalent cancer diagnosed in Europe, according to figures provided by the Joint Research Center (JRC) of the European Union. In the EU-27, it was predicted that more than 355,000 women would receive a breast cancer diagnosis in 2020.

The region with the biggest growth is expected to be Asia Pacific, which will benefit from rising patient populations, advanced medicine demand, and considerable increases in healthcare spending. For instance, F. Hoffmann-La Roche Ltd. announced the arrival of atezolizumab, an immunotherapy medicine, in India in April 2020 for the treatment of metastatic triple-negative breast cancer (TNBC).

In 2019, the Middle East and Africa's and Latin America's emerging markets contributed a considerably smaller contribution. But because of the increased presence of well-known firms in the regions, rising healthcare costs, soaring patient population, and high demand for sophisticated therapies, they are predicted to rise significantly over the course of the projection year.

### Breast Cancer Therapeutics Market Size, By Countries (in \$ Bn)

Country	2022	CAGR	2030F
US	764.4	10.9%	1748.9
China	146.3	14.4%	429.2
Canada	145.6	12.9%	384.3
Japan	113.1	13.4%	309.4
Germany	66.6	11.1%	154.6
France	50.1	11.9%	123.0
UK	47.3	10.9%	108.3
Brazil	45.5	13.9%	128.9
Italy	43.7	12.4%	111.3
Spain	35.1	11.9%	86.4
India	33.1	15.9%	107.8
Saudi Arabia	30.9	14.4%	90.8
South Korea	26.6	13.9%	75.3
Australia	21.8	14.4%	64.1
Turkey	14.6	13.4%	39.8
UAE	9.1	13.9%	25.8
Egypt	5.1	14.4%	14.9
Hong Kong	2.9	13.9%	8.3
Russia	29.7	--	--
Mexico	27.3	--	--
South Africa	11.8	--	--
Indonesia	10.9	--	--
Poland	10.6	--	--
Vietnam	9.1	--	--
Austria	7.3	--	--
Kuwait	7.3	--	--
Qatar	7.3	--	--
Sweden	6.6	--	--
Portugal	5.5	--	--
Romania	5.3	--	--

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