



# **Market Research Report: Prescription Behaviour and Market Trends for Anti- Cancer Drugs in India**

**Comprehensive Analysis (2023–2026)**

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# Executive Overview

01

## Research Objectives

Define scope and key questions driving analysis

02

## Methodology

Data sources and research approach

03

## Disease Landscape

Top cancer types and prevalence patterns

04

## Market Dynamics

Leading medications, companies, and growth trends

05

## Strategic Analysis

SWOT assessment and actionable recommendations

# Research Objectives



## Epidemiological Mapping

Identify the top 5 cancer types and their prevalence patterns across Indian demographics and geographic regions

## Market Intelligence

Analyze market share distribution and revenue performance of leading oncology medications and pharmaceutical companies

## Behavioral Insights

Evaluate prescription behavior patterns, formulary decisions, and the impact of pricing regulations on treatment choices

## Strategic Assessment

Conduct comprehensive SWOT analysis to identify risks and opportunities for new drug market entry and expansion

# Research Methodology

1

## Secondary Market Research

Comprehensive analysis of published industry reports, regulatory filings, and market intelligence databases focusing on oncology therapeutics

2

## Government & Regulatory Sources

National Cancer Registry Programme (NCRP), National Pharmaceutical Pricing Authority (NPPA) reports, Ministry of Health bulletins, and WHO India reports

3

## Corporate Filings

Annual financial reports, investor presentations, and product portfolio disclosures from key players: Biocon, Roche, AstraZeneca, Merck, Cipla, Natco

4

## Industry Publications

Peer-reviewed journals, trade publications, PharmaShots, industry conference proceedings, and market research reports from leading consultancies

*Timeframe: Recent 3-year data (2023–2026 projections) with emphasis on 2023 baseline and forward-looking estimates*

# Top 5 Cancer Types in India

Based on incidence rates and treatment burden across the healthcare system

## Breast Cancer

Leading cancer among women, accounting for 14% of all cancer cases. Rising incidence in urban centers with increasing awareness and screening programs

## Oral & Lip Cancer

Most prevalent in males, strongly associated with tobacco and betel nut use. Regional variations show higher burden in tobacco-consuming states

## Cervical Cancer

Second most common women's cancer, linked to HPV infection. High mortality due to late-stage diagnosis in underserved populations

## Lung Cancer

Growing incidence driven by smoking, pollution, and occupational exposures. Increasing mortality rates despite therapeutic advances

## Gastric Cancer

High prevalence in certain regions, associated with dietary factors and H. pylori infection. Often diagnosed at advanced stages



# Leading Medications & Market Players

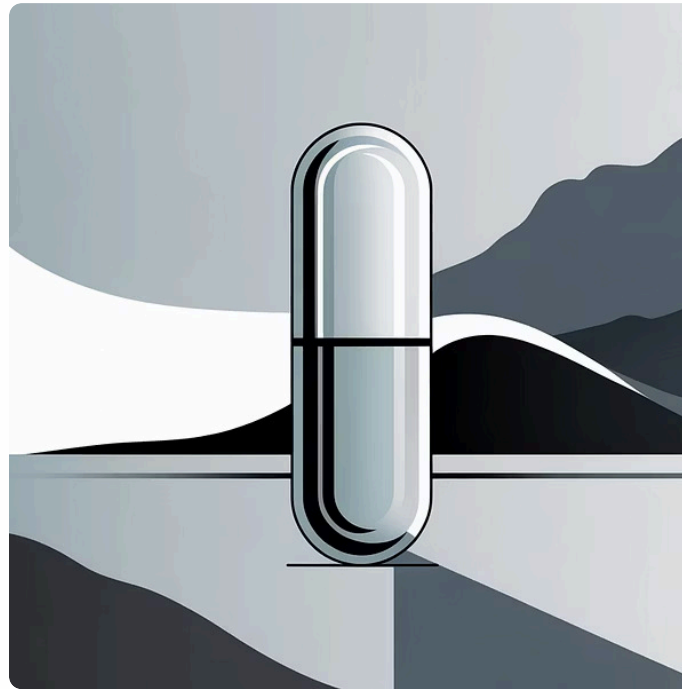


## Trastuzumab

**Companies:** Roche (innovator) & Biocon (biosimilar)

HER2-positive breast cancer therapy. Biosimilar entry dramatically reduced costs, expanding patient access. Dominant market share in targeted breast cancer segment

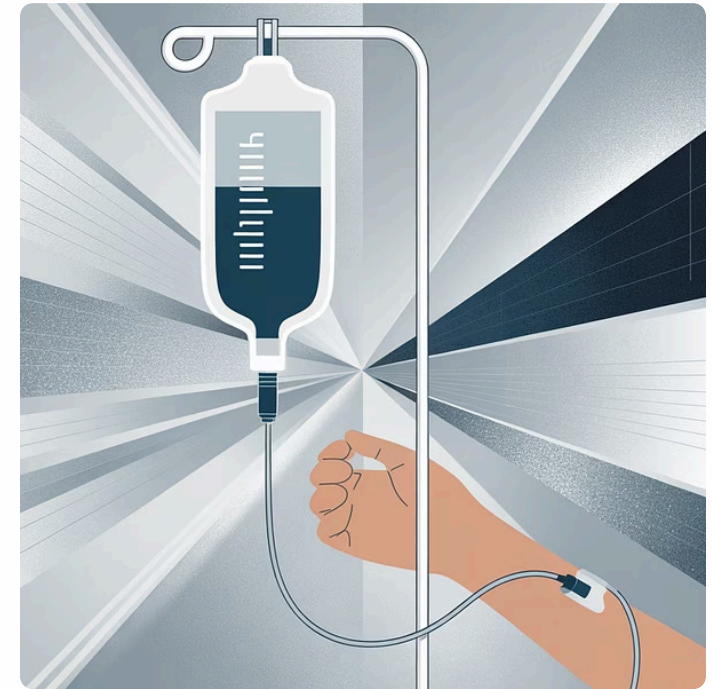
**Generic Powerhouses:** Cipla and Natco play crucial role in affordable generic oncology drugs, biosimilar production, and patient access programs



## Osimertinib

**Company:** AstraZeneca

Third-generation EGFR inhibitor for non-small cell lung cancer. Premium pricing with strong clinical data. Growing adoption in mutation-positive patients



## Pembrolizumab

**Company:** Merck

PD-1 inhibitor for multiple cancer types including lung, head & neck, and gastric cancers. High-cost immunotherapy with expanding indications

# Market Trends & Growth Trajectory

**\$2.5B**

## Market Size by 2025

Projected oncology drug market value in India, driven by rising incidence and improved treatment access

**12-20%**

## Annual Growth Rate

Compound annual growth rate (CAGR) reflecting market expansion, biosimilar adoption, and healthcare infrastructure development

**60%**

## Biosimilar Volume Share

Proportion of total oncology drug volume represented by biosimilars, significantly reducing treatment costs

## Key Growth Drivers

- Increasing cancer incidence rates across all age groups
- Expansion of health insurance coverage (Ayushman Bharat)
- Government initiatives for early detection and screening
- Biosimilar market maturation reducing barriers to innovation

## Market Dynamics

The Indian oncology market is experiencing robust growth, fueled by rising incidence rates, improved healthcare infrastructure, and expanding insurance coverage. Biosimilars now dominate volume share while innovator brands maintain premium positioning.



# Pricing Regulation & Prescription Behavior



## NPPA Price Caps

National Pharmaceutical Pricing Authority imposes price controls on essential cancer drugs, limiting profit margins but improving affordability and patient access



## Precision Oncology

Growing adoption of biomarker-driven therapies requires companion diagnostics, influencing formulary decisions and reimbursement strategies



## Ayushman Bharat Impact

Government health insurance scheme covering 500 million people drives volume growth, influences formulary inclusion, and shifts payment dynamics

## Prescription Patterns

Oncologists increasingly balance clinical efficacy with cost considerations. Formulary positioning, insurance coverage, and patient assistance programs significantly influence prescribing decisions.

## Reimbursement Landscape

Complex mix of government schemes, private insurance, and out-of-pocket payments creates varied access scenarios. High-cost therapies face prior authorization hurdles.



# SWOT Analysis: Indian Oncology Market



## Strengths

- Strong generic/biosimilar manufacturing capability
- Cost-competitive production infrastructure
- Large pool of skilled oncologists
- Government healthcare initiatives
- Growing health insurance penetration



## Weaknesses

- Limited R&D investment in novel oncology drugs
- Infrastructure gaps in rural areas
- Late-stage diagnosis patterns
- Regulatory approval delays
- Price-sensitive market dynamics



## Opportunities

- Biosimilar market expansion
- Precision medicine adoption
- Digital health integration
- Export market growth
- Strategic partnerships with innovators



## Threats

- Stringent pricing regulations
- Import substitution policies
- Intellectual property challenges
- Competition from Chinese manufacturers
- Economic volatility impacting healthcare spend

# Strategic Recommendations



## Strategic Partnerships

Collaborate with local generic manufacturers for biosimilar co-development and distribution. Leverage their market access and regulatory expertise while maintaining innovation control



## Patient Assistance Programs

Implement comprehensive PAPs to address affordability barriers. Include insurance navigation support, co-pay assistance, and long-term patient management to drive brand loyalty



## Clinical Evidence Generation

Invest in real-world evidence studies demonstrating cost-effectiveness. Build local clinical data supporting formulary inclusion and physician education programs



## Precision Medicine Focus

Develop companion diagnostics and biomarker strategies. Position high-value therapies for molecularly-defined patient subgroups with clear clinical benefit narratives

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## Conclusion: Promising Yet Challenging Market

India's oncology market presents compelling growth opportunities balanced by regulatory and pricing complexities. Success requires balancing affordability mandates with innovation incentives, building strong local partnerships, and demonstrating clear clinical and economic value propositions.

**References:** NCRP (National Cancer Registry Programme) • NPPA Reports • WHO India Country Profile • Ministry of Health & Family Welfare Bulletins • PharmaShots Industry Analysis • Company Annual Reports (Roche, AstraZeneca, Biocon, Merck, Cipla, Natco)