MEDIFIRM
INTELLEDGE GLOBAL
HEALTHCARE SOLUTIONS

GLOBAL HEALTHCARE INTELLIGENCE

Global Oncology Competitive Intelligence

Drugs, Companies & Therapy Area Landscape

$275B+

global oncology market

Medifirm Intelledge Global | Executive Briefing

Oncology is scaling through modality convergence

Growth remains broad based, while differentiated platforms are reshaping competitive advantage.

$275B+

MARKET SCALE

Global oncology market with an expected 6 to 8% CAGR.

ADCs + CAR-T

INNOVATION ENGINE

Platform convergence is accelerating precision delivery and immune modulation.

Core leaders

COMPETITIVE FIELD

Roche, Merck, AstraZeneca and BMS anchor the landscape.

Platform breadth matters, but biomarker precision and speed to market increasingly decide share capture.

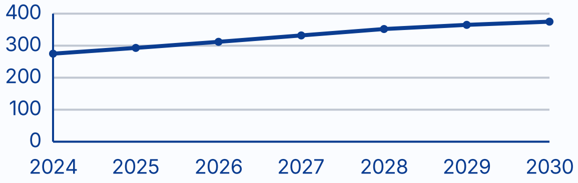
Source synthesis: FDA, EMA, ASCO, ESMO, IQVIA, Evaluate Pharma

Growth is durable, with mix shifting toward targeted modalities

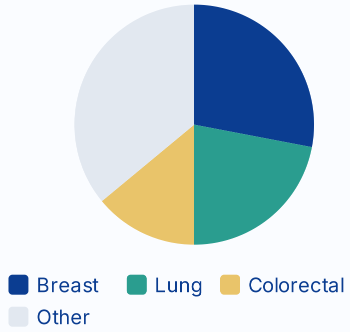
GLOBAL ONCOLOGY MARKET

$275B → $375B

Illustrative 2024 to 2030 trajectory at 6 to 8% CAGR.



LEADING SEGMENTS



ACCELERATING SIGNALS

- Precision oncology
- AI driven discovery
- Faster approvals

SIGNAL PROGRESSION

Today
Biomarker expansion

Near term
AI enabled trials

Next wave
Platform convergence

Illustrative estimates for strategic discussion

Three therapy arenas define the next competitive battleground

Leadership depends on combining validated biology with differentiated delivery platforms.

Breast cancer

MATURE TO INNOVATIVE

HER2 targeting, CDK4/6 inhibitors and ADC leaders are extending treatment depth.

Lung cancer

HIGH VELOCITY INNOVATION

Immunotherapy breakthroughs compete with targeted options across mutations.

Hematologic malignancies

PLATFORM TRANSFORMATION

CAR-T and bispecific antibodies are changing treatment sequencing and access models.

TREATMENT EVOLUTION

Chemotherapy → Targeted therapy → Immunotherapy → **Programmable platforms**

Assessment lens: clinical differentiation, biomarker reach, manufacturing complexity

Platform innovation is moving from products to reusable engines

Immune checkpoint inhibitors

Broad portfolio depth and combination strategies extend franchise life.

Antibody drug conjugates

Linker, payload and target selection create a competitive technology stack.

CAR-T cell therapy

Persistence, allogeneic approaches and manufacturing define the next wave.

Emerging modalities

Bispecifics, radioligands and RNA therapeutics widen the opportunity set.

MECHANISM LOGIC Target → Payload → Cell response → **Durable outcome**

Platform reuse can compress development timelines and increase partnering leverage

Scale leaders defend franchises while buying platform optionality

Company	Flagship strength	Pipeline posture	Strategic signal
Roche	HER2 and diagnostics	Biomarker depth	Integrated ecosystem
Merck	Checkpoint leadership	Combination engine	Lifecycle defense
AstraZeneca	ADC and lung depth	High expansion	Partnership velocity
BMS	Immuno-oncology	Cell therapy reach	Portfolio balance

WATCHLIST

Pfizer, Novartis, J&J and Eli Lilly through acquisitions and investments.

DECISION SIGNAL

Pipeline strength is measured by mechanism quality, not asset count alone.

Directional assessment based on public disclosures

The next wave will be won at the transition points

Late stage execution, regulatory timing and commercial readiness create the clearest intelligence advantage.

LATE STAGE PIPELINE

Phase III100%

Regulatory su

Potential la

Directional funnel for prioritization, not a forecast.

CATALYST WINDOWS

2026 ADC label expansion and biomarker readouts

2028 Next generation cell therapy scale up

2030 Platform convergence and access redesign

Established pharma

Strength: scale and access. Risk: legacy portfolio drag and slower decision cycles.

Emerging biotech

Strength: mechanism focus. Risk: capital intensity, manufacturing and commercialization gaps.

Recommended dashboard fields: trial status, biomarker, regulatory event, access risk and partner activity

Win the intelligence cycle before the market moves

Convert fragmented signals into repeatable decisions across portfolio, partnerships and launch readiness.

01

Prioritize platform fit

Rank by biomarker reach, delivery advantage and differentiated outcomes.

02

Build partnership options

Access ADC, radioligand and cell therapy capabilities faster.

03

Track catalysts continuously

Link trial readouts, regulatory events and competitor moves in a live dashboard.

BOTTOM LINE

Competitive advantage comes from seeing mechanisms, partners and approval signals earlier than peers.

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