

Oncolytic Virus Therapy Market Set to Reach USD 199.98 Million by 2033, Led by North America's 33.50% Market Share

AUSTIN, TX, UNITED STATES, November 28, 2025 /EINPresswire.com/ --

According to DataM Intelligence, the Global [Oncolytic Virus Therapy Market](#) size is growing from US\$ 27.33 million in 2024 to US\$ 199.98 million by 2033, registering a robust CAGR of 24.9% during the forecast period 2025–2033.

The surge in cancer incidence worldwide, coupled with advances in genetic engineering and viral vector technology, is driving the demand for oncolytic virus therapies. These therapies selectively infect and destroy cancer cells while sparing healthy tissue, offering a promising alternative to traditional cancer treatments.

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Oncolytic Virus Therapy Market surges with rising cancer cases, clinical trials, & immunotherapy demand. Key players drive innovations in viral treatments.”

DataM Intelligence

With ongoing clinical trials and regulatory approvals, oncolytic virus therapy is set to transform oncology by enhancing targeted treatment options across various cancer types, improving patient outcomes, and reducing side effects. The increasing integration of immunotherapy approaches further fuels market growth in this innovative therapeutic segment.

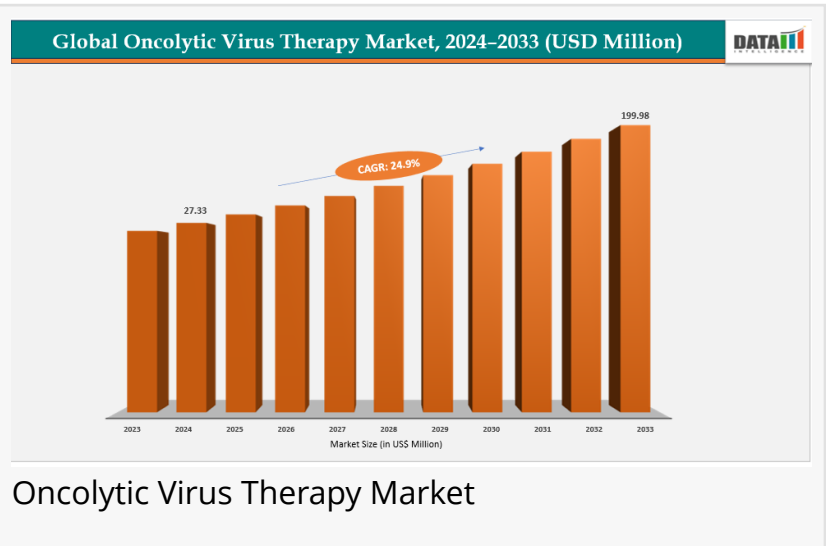
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Key Industry Developments:

- Transgene successfully completed a fundraising of approximately €105 million to support



ongoing Phase 2 trials in head and neck cancers, demonstrating progress in clinical development of oncolytic virus therapies with expected key results soon.

- Japan intensified investment in oncolytic virus therapy research, led by collaborations between local conglomerates and global biotech firms, driving innovation in engineering delivery systems for better tumor penetration and immune response.

- Merck acquires Telomir Pharmaceuticals: Merck KGaA completed its acquisition of Telomir Pharmaceuticals. While Telomir focuses on anti-aging therapeutics targeting telomere length, this deal strengthens Merck's broader oncology R&D pipeline and biotech capabilities relevant to advanced therapies like oncolytic viruses.

- AstraZeneca acquires Fusion Pharmaceuticals: AstraZeneca completed its acquisition of Fusion Pharmaceuticals for approximately \$2.4 billion. Fusion is a clinical-stage biopharmaceutical company developing targeted alpha therapies (TATs). This acquisition enhances AstraZeneca's oncology pipeline with novel radioconjugates, which represents a growing area of synergy with viral therapy research.

- Bristol Myers Squibb (BMS) expands cell therapy manufacturing: BMS made strategic investments to expand its cell therapy manufacturing capabilities, which are crucial for the development and commercialization of advanced immunotherapies, a category that often includes oncolytic viruses.

Market Growth Drivers

- The Oncolytic Virus Therapy Market is driven primarily by the rising global incidence of cancer, especially aggressive and treatment-resistant tumors such as glioblastoma, pancreatic cancer, and metastatic melanoma. As these cancers often respond poorly to conventional therapies like chemotherapy and radiation, there is growing demand for innovative approaches like oncolytic virus therapy which can selectively infect and destroy tumor cells while activating long-term immune responses against cancer.

- Advancements in genetic engineering and virotherapy are another crucial growth driver. Improved viral platforms, including herpes simplex virus (HSV), adenoviruses, and vaccinia viruses, are enabling the design of safer, more targeted, and effective oncolytic virus treatments. These engineered viruses not only induce direct tumor lysis but also deliver therapeutic transgenes that enhance immune modulation, making combination therapies with immune checkpoint inhibitors and CAR-T treatments increasingly viable and effective.

- Government funding and expanding clinical research further accelerate market growth by supporting R&D, clinical trials, and regulatory approvals. Major biotech firms and academic institutions, particularly in the US, Europe, and Asia Pacific, are investing heavily in developing novel oncolytic virus therapies. This supportive environment fosters innovation for treating rare and pediatric cancers, utilizing neoadjuvant/adjuvant settings, and incorporating AI and machine

learning to optimize viral design and behavior prediction, boosting the market's potential and adoption.

Segmentation Analysis

-By Drug

The market includes key drugs such as Imlygic, Delytact, and Oncorine. Imlygic is widely used for treating melanoma and holds a significant market share due to its early FDA approval and proven clinical efficacy. Delytact is prominent in treating malignant glioma, targeting brain tumors with high unmet need, while Oncorine is increasingly adopted in Asia for head and neck cancers owing to regional regulatory approvals and clinical acceptance.

-By Virus Type

The virus type segmentation includes Herpes Simplex Virus type-1, Adenovirus type-5, and Others. Herpes Simplex Virus type-1 leads the market due to its successful application in commercial oncolytic virus therapies like Imlygic. Adenovirus type-5 shows strong growth potential with advancements in genetic engineering increasing targeting specificity. The Others category comprises emerging viral types such as vaccinia and reovirus, which are gaining traction in clinical trials for diverse cancer indications.

-By Indication

Indications include Head and Neck Cancer, Unresectable Melanoma, and Malignant Glioma. Unresectable Melanoma holds the largest revenue share driven by responsiveness to immunotherapy approaches. Head and Neck Cancer is an expanding segment fueled by rising prevalence and treatment innovation. Malignant Glioma represents a critical segment with significant R&D focus due to the poor prognosis and high unmet need in brain cancers.

-By Distribution Channel

The distribution channel is divided into Hospital Pharmacies and Retail Pharmacies. Hospital Pharmacies dominate distribution due to the specialized administration and monitoring requirements of oncolytic virus therapies. However, Retail Pharmacies are growing as outpatient treatment modalities and patient access initiatives increase adoption outside hospital settings, especially in developed regions.

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Regional Insights:

-The North America region holds the largest market share in the Oncolytic Virus Therapy Market, accounting for approximately 33.50% of the market in 2025. This dominant position is driven by the region's advanced healthcare infrastructure, significant investments in biotechnology, strong research institutions, progressive regulatory support, and fast-track designations by the FDA for innovative therapies. The United States and Canada in particular lead the adoption and development of oncolytic virus therapies due to these factors.

-Following North America, Europe holds a significant share in the market. Europe's presence is bolstered by strong government initiatives, supportive regulatory frameworks, and growing research funding, especially in Western Europe. The market in Europe benefits from collaborative efforts between public and private sectors which accelerate clinical trials and adoption of new therapies.

-The Asia Pacific region is another key player in the oncolytic virus therapy market, showing robust growth due to increasing healthcare expenditure, rising cancer prevalence, and expanding biotechnology research. Government initiatives in countries like China, Japan, and India to promote advanced therapies and growing awareness in the healthcare sector contribute to the steady increase in the market share for this region.

Competitive Landscape:

-The Oncolytic Virus Therapy Market is shaped by major established companies such as Amgen, Inc., Shanghai Sunway Biotech Co., Ltd., and Daiichi Sankyo Co., Ltd., which leverage extensive R&D capabilities, regulatory expertise, and robust commercial infrastructures to lead in product development and global market penetration. These incumbents focus on advancing next-generation oncolytic viruses with enhanced targeting, safety profiles, and combination therapy potential.

-Emerging innovators including Oncolytics Biotech Inc., KaliVir Immunotherapeutics, Inc., TILT Biotherapeutics (TILT), Memgen, Inc., Genelux Corporation, CG Oncology, and Candel Therapeutics, Inc. contribute dynamic innovation to the market by developing novel viral platforms, gene-modified oncolytic therapies, and personalized treatment approaches. These players often engage in strategic partnerships with academic institutions and large pharmaceutical companies to accelerate clinical development and expand therapeutic indications.

-Collaborations and technology licensing agreements across the ecosystem fuel continuous progress, improving therapeutic efficacy through combination with immunotherapies, checkpoint inhibitors, and CAR-T cell therapies. This competitive landscape is also marked by sustained investment in advanced manufacturing, regulatory compliance, and market expansion strategies, positioning these companies as pivotal contributors to the evolving oncolytic virus therapy market.

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Conclusion

The Oncolytic Virus Therapy Market is poised for robust expansion through 2035, propelled by clinical trial successes and immunotherapy synergies. Innovations in viral engineering promise targeted cancer treatments, transforming oncology outcomes globally.

Related Reports:

1. [Retinoblastoma Market](#) - is expected to reach US\$ 1440.28 million by 2031
2. [Metastatic Colorectal Cancer Market](#) - is expected to reach US\$ 4.8 billion by 2030

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