Cystic Fibrosis Market Research Report - Global Forecast till 2025

Cystic Fibrosis Market Overview

The Global Cystic Fibrosis Market is expected to register a CAGR of 13.5% and is anticipated to reach USD 12,943.1 million by 2025. Cystic fibrosis is a chronic, genetic disease that is currently affecting the lives of around 70,000 people all across the world. Currently, the condition is not entirely curable, but it is manageable with the help of specific medication and therapies. The significant growth in the cystic fibrosis market was observed with the introduction of Kalydeco drug by Vertex pharmaceutical in 2012. There has been constant development of new medicines and therapies for treating cystic fibrosis. Cystic fibrosis foundation (CFF) has always been in support of the companies involved in the research and development of the cystic fibrosis drugs. The financial backing of CFF is influential in the growth of the cystic fibrosis market worldwide.

Market Dynamics

Vertex Pharmaceuticals Incorporated is currently the most prominent company operating in the cystic fibrosis segment. The company has done some excellent work in the development of the drugs for the disease and has two FDA approved drugs, namely Kalydeco and Orkambi. With Kalydeco and Orkambi covering the CF mutations of around 4% and 50% respectively, the company is looking for the next step to cover and treat nearly 90% of the mutations caused by the disease. According to the company website, Vertex has begun the clinical trials for the so-called “triple combo” pills. The development of this new drug will boost the cystic fibrosis market shortly. Apart from this, there are many other companies such as AbbVie, Gilead LifeSciences, Actavis (Allergan), Genentech (Roche), and Novartis which are involved in the development of various drugs for cystic fibrosis treatment. Pancreatic replacement drugs such as Pertyze, Zenpep, and Creon as well as mucolytic drugs such as Pulmozyme have played an instrumental role in the growth of the cystic fibrosis market.

Currently, Abbvie is developing the drugs with the molecule names ABBV-2222, ABBV-2451, and ABBV-974 for the cystic fibrosis. Gilead Sciences also have the drug molecule GS-5745 in the development phase for the cystic fibrosis. The development of these new drugs is expected to boost the market for cystic fibrosis in the near future.

Global Cystic Fibrosis Market Size, by Treatment Method, 2015 & 2022 (USD Million)
The global cystic fibrosis market has been segmented into treatment method. By treatment method, the market has been segregated into Medication, devices, other treatments. The medication segment accounted for a market value of USD 2802.7 million in 2016.

Key Players

The prominent players in the global cystic fibrosis market are AbbVie, Allergan PLC, Chiesi Farmaceutici SpA, F. Hoffmann-La Roche AG, Gilead Sciences, Novartis AG, Pharmaxis Ltd, PTC Therapeutics, and Vertex Pharmaceuticals Incorporated.

Some of the key strategies followed by the players operating in the global cystic fibrosis market were innovation, product development, acquisition, and expansion.

Regional Analysis

The global cystic fibrosis market, based on region, is divided into North America, Europe, Asia-Pacific, and the Middle East & Africa. North America is one of the majorly affected region by the deadly disease cystic fibrosis and accounted for 43.2% of the global market share. The US is among the countries with the highest incidence rates of cystic fibrosis. According to the cystic fibrosis foundation, more than 30,000 patients are living with cystic fibrosis in the US. Nearly, 1000 new cystic fibrosis cases are diagnosed each year. According to CFF’s national patient registry, the median age of the person with cystic fibrosis is currently 33.4 years. The average life expectancy of the CF patients has increased significantly as compared to the patients 30 years back. This is due to the continuously developing medications. The principal relief for the cystic fibrosis patients is because of the CFTR modulator drugs called “Kalydeco” and “Orkambi” developed by US-based company, Vertex Pharmaceuticals Incorporated.

Europe is expected to be the fastest-growing region during the forecast period at the CAGR of
Key Updates

- In **November 2016**, Chiesi Farmaceutici announced the acquisition of Atopix Therapeutics Limited, a UK-based biological company involved in treatments for asthma. Under this agreement, the company will purchase all outstanding shares of Atopix, assets, business for a total amount, inclusive of development, regulatory and commercial milestones, that could exceed €75 million. This acquisition of Atopix will leverage the companies pipeline in respiratory disorders, mainly in eosinophilic airways diseases.

- In **September 2016**, Pharmaxis got the approval for its orphan drug Bronchitol to be sold in Russia for the treatment of cystic fibrosis. As the Russian market is massive, it will enhance the financial growth of the company.

- In **September 2016**, Vertex Pharmaceuticals announced that the US Food and Drug Administration (FDA) approved ORKAMBI for the use of children (age 6) suffering from cystic fibrosis. This approval will help patients suffering from cystic fibrosis at the early stage of their fight against the disease.

Market Segmentation

**Global Cystic Fibrosis Market, by Treatment Method**

- Medication
- Devices
- Others

**Global Cystic Fibrosis Market, by Region**

- North America
  - US
  - Canada
- Europe
  - Western Europe
    - Germany
    - UK
    - France
    - Italy
    - Spain
    - Rest of Western Europe
  - Eastern Europe
- Asia-Pacific
  - China
  - Japan
  - India
  - Australia
  - South Korea
  - Rest of Asia-Pacific
- Middle East & Africa
  - Middle East
  - Africa

Available Additional Customizations

Intended Audience

- Medical device manufacturers and distributors
- Government research organizations
Infographic Summary:

GLOBAL CYSTIC FIBROSIS MARKET

The global Cystic Fibrosis market is expected to reach USD 12,943.1 million by 2025.

Global Cystic Fibrosis Market Share, by Region, 2018 (%)

- **AMERICAS**: 43%
- **EUROPE**: 20%
- **ASIA-PACIFIC**: 16%
- **MIDDLE EAST & AFRICA**: 21%

**DRIVERS:**
- Development of New Drugs and Therapies
- Financial Support from CFF in Research and Development of CF Drugs

**RESTRAIN:**
- High Cost of the Drugs and Treatment

**KEY PLAYERS:**
- Vertex Pharmaceuticals
- Abbvie
- Gilead
- Novartis
- F. Hoffmann-La Roche AG
- Pharmaxis Ltd
- Merck & Co, Inc
- Alcresta Therapeutics, Inc.
- AstraZeneca
TABLE OF CONTENTS

1  INTRODUCTION

   1.1 Definition 8
   1.2 Scope of Study 8
   1.3 Research Objective 8
   1.4 Assumptions & Limitations 9
      1.4.1 Assumptions 9
      1.4.2 Limitations 9
   1.5 Market Structure 9

2  RESEARCH METHODOLOGY

3  MARKET DYNAMICS

4  MARKET FACTOR ANALYSIS

5  CYSTIC FIBROSIS MARKET, BY TREATMENT METHOD

6  CYSTIC FIBROSIS MARKET, BY REGIONS

7  COMPANY SHARE ANALYSIS

8  COMPANY PROFILE

9  LIST OF TABLES

10 LIST OF FIGURES