Global Actinic Keratosis Treatment Market: Information by Type (Medications and Procedures), End User (Hospitals & Oncology Centers, Dermatology Clinics and Ambulatory Surgical Center) and Region (Americas, Europe, Asia-Pacific, and the Middle East & Africa) - Forecast till 2024

Market Overview

The Global Actinic Keratosis Treatment Market is expected to register a CAGR of 4.20% and is anticipated to reach USD 6,088.4 Million by 2024. Actinic Keratosis (AK), or solar keratosis are precancerous skin lesions that occur on the epidermis due to long-term sun exposures. These lesions have the potential to develop into skin cancers. Therefore, the treatment of such medical conditions is a necessary preventive measure to avoid skin cancer. This formulates a developmental background for the global actinic keratosis market.

The increasing prevalence of actinic keratosis, growing acceptance of minimally invasive therapeutic procedures, the presence of suitable medical coverage, and the growing geriatric population are estimated to be the drivers for the market growth. However, the high cost and risk factors associated with available treatment options are estimated to restrain the market growth during the forecast period.

Market Dynamics

Actinic keratosis is estimated to be the most common pre-cancer for skin, and its global prevalence is increasing. According to the Massachusetts Association of Public Health Nurses in 2015, it was estimated that actinic keratosis affected more than 58 million Americans. Further, similar prevalence trends were observed in the European region. A study published in the Dermatology and Therapy Journal in 2015 states that the prevalence of actinic keratosis was about 19 to 25 percent in the UK. The increasing prevalence of this disease, along with the growing demand for therapeutics is propelling the growth of the market. Additionally, growing acceptance of minimally invasive therapeutic procedures, the presence of suitable medical coverage, and the growing geriatric population is estimated to drive the market growth. On the other hand, the high procedural cost and risk factors associated with available treatment options is anticipated to hamper the market growth.

Global Actinic Keratosis Treatment Market Size, by End User, 2017 (USD Million)
The global actinic keratosis treatment market has been segmented into type, and end user. By type, the market has been segregated into medications and procedures. The global actinic keratosis treatment market, by medications, has been divided into fluorouracil cream, imiquimod cream, ingenol mebutate gel, and diclofenac gel. The global actinic keratosis treatment market, by procedures, has been bifurcated into cryotherapy, photodynamic therapy, laser, chemical peel, and others. Based on the end user, the global actinic keratosis treatment market is segment into hospitals & oncology centers, dermatology clinics, ambulatory surgical center, others. The hospitals & oncology centers segment accounted for a market value of USD 1,513.2 million in 2017.

The prominent players in the global actinic keratosis treatment market are Biofrontera AG (Germany), Cipher Pharmaceuticals Inc. (Canada), BioLineRx (Israel), Valeant Pharmaceuticals (US), LEO Pharma (Denmark), Galderma SA (Switzerland), Sun Pharmaceutical Industries Ltd. (India), 3M (US), Alma Lasers (Israel), and Stanford Chemicals (US).

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

Global Actinic Keratosis Treatment Market Share, by Region, 2017 (%)

The global actinic keratosis treatment market, based on region, has been divided into the Americas, Europe, Asia-Pacific, and the Middle East and Africa. The Americas accounted for the largest market share of about 43.5% in the global actinic keratosis treatment market, in 2017. The large share is majorly attributed due to the presence of major manufacturers, increasing the prevalence of actinic keratosis, and growing demands for minimally invasive procedures within the region. The European market for actinic keratosis treatment is expected to be the second-largest during the forecast period. The increasing reported cases of actinic keratosis and rising medical tourism is expected to boost the growth of the market in this region.

Asia-Pacific is estimated to be the fastest-growing market due to the rising geriatric population and high prevalence of the disease in southern areas, such as Australia and New Zealand are likely to provide good opportunities for market players in this region. The Middle East & Africa, with the presence of low-income countries and stringent government regulations, accounted for the least market share in 2017.

Key Updates
In April 2018, Cipher Pharmaceuticals acquired Canadian Rights for the US FDA-approved A 101 40% Topical Solution.

In December 2017, Biofrontera filed an investigational application with the US FDA for phase iii trial of ameluz to treat basal cell carcinoma.

Market Segmentation

Global Actinic Keratosis Treatment Market, by Type

- Medications
  - Fluorouracil Cream
  - Imiquimod Cream
  - Ingenol Mebutate Gel
  - Diclofenac Gel

- Procedures
  - Cryotherapy
  - Photodynamic Therapy
  - Laser
  - Chemical Peel
  - Others

Global Actinic Keratosis Treatment Market, by End User

- Hospitals & Oncology Centers
- Dermatology Clinics
- Ambulatory Surgical Center

Global Actinic Keratosis Treatment Market, by Region

- Americas
  - North America
    - US
    - Canada
  - Latin America

- Europe
  - Western Europe
    - Germany
    - UK
    - France
    - Italy
    - Spain
    - Rest of Western Europe
  - Eastern Europe

- Asia-Pacific
  - China
  - Japan
  - India
  - Australia
  - Republic of Korea
  - Rest of Asia-Pacific

- Middle East & Africa
  - Middle East
  - Africa

Available Additional Customizations

- Additional Companies
  - Hill Dermaceuticals, Inc.
  - Mylan N.V.

Intended Audience

- Pharmaceutical companies
- Medical Research Institutes
Hospitals
Ambulatory surgical center
Potential investors
Government associations
End users

Infographic Summary:

GLOBAL ACTINIC KERATOSIS TREATMENT MARKET

BY REGION MARKET SHARE 2017 (%)

Americas
Europe
Asia Pacific
Middle East & Africa

BY TYPE MARKET SHARE 2017 (%)

Procedures
Medications

BY END USERS MARKET SHARE 2017 (%)

- Hospitals & Oncology Centers
- Dermatology Clinics
- Ambulatory Surgical Center
- Others

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