Immunosuppressive Drugs Market Research Report - Global Forecast till 2025

Description:

Market Forecast

The Global Immunosuppressive Drugs Market is expected to cross USD 1.39 Billion by 2025 at a CAGR of 4.63%. Immunosuppressants are generally used post organ transplants and for the treatment of autoimmune diseases such as multiple sclerosis, rheumatoid arthritis, and psoriasis. According to the World Health Organization (WHO) and the Spanish Transplant Organization, Organización Nacional de Trasplantes (ONT), in 2018, organ transplants increased by 7.25% from the previous year to reach approximately 138,000, including 40.4% living kidney transplants and 19.8% living liver transplants.

Market Synopsis

Immunosuppressive drugs find utility post organ transplants when the receiver’s immunity must be suppressed for the body to accept the newly attached organ. This market is growing due to the increasing number of organ transplants and advances in tissue engineering and organ transplant techniques.

Market USP

Increase in the number of organ transplants and rising prevalence of autoimmune diseases globally would directly fuel market growth.

Market Drivers

- Growing number of organ transplantation procedures. The increasing number of organ transplants for lungs, kidneys, liver, and pancreas, among other organs, is one of the major drivers for market growth. As per the WHO and ONT, in 2018, there were 91,800 kidney transplantation procedures globally, a 6.5% increase from 2017; 6,200 lung transplantation procedures, a 7.2% increase; and 30,800 liver transplantation procedures, a 5.5 % increase. Due to the increase in the number of organ transplantation procedures worldwide, major companies in the market are focusing on strengthening their position and expanding business operations through strategic initiatives and product launches.
- Imperative for the success of organ transplants
- Increasing prevalence of autoimmune disease due to changing lifestyles

Market Restraints

- Stringent regulatory and approvals processes
- Immunosuppressive drugs usually do not offer any complementary treatment

Segmentation

By Drug Type

- Calcineurin Inhibitors: A very high success rate makes this
the preferred type of immunosuppressant. Very successful for kidney transplants where the post-op survivability has increased to 90% for the first year and 75% for 5 years, according to the US National Center for Biotechnology Information.

- Corticosteroids: Beneficial in the treatment of autoimmune disorders, they are also used to suppress the immune response after organ transplants. However, a plethora of side effects limits their use.
- Antiproliferative Agents: Widely used for chronic renal transplant dysfunction and certain autoimmune diseases. Used for conditions that require sustained drug release.
- mTOR Inhibitors: Useful in cancer therapy, these drugs find limited applicability in treatment post organ transplants and for autoimmune disorders due to possible acute side effects.
- IMDH Inhibitors: The use of IMDH inhibitors reduces the risk of the patients developing Parkinson’s disease due to the intake of immunosuppressants.
- Others: This segment covers drugs such as biologics and monoclonal antibodies, as well as experimental drugs.

By Route of Administration

- Intravenous: Used when oral administration is not possible and for certain specific organ transplants with a high failure rate, such as cardiac transplants. Intravenous immunosuppressants have stronger action and side effects.
- Oral: The usual route of administration for most immunosuppressants.
- Others: Includes immunosuppressants administered nasally, rectally, and vaginally. These are usually for very specific disorders and constitute a niche segment of the market.

By Application

- Autoimmune Disease: The largest segment of the market due to the increasing incidence of autoimmune diseases, especially in developed nations. The segment is slated to grow as autoimmune diseases usually require lifelong medication.
- Organ Transplant: A fast-growing segment, organ transplants are becoming increasingly common and offer consistently better survival rates. Immunosuppressant drugs are critical to the success of organ transplants.
- Kidney Transplant: The most transplanted organ accounting is the kidney. A well-developed immunosuppressive drug market exclusively for kidney transplants serves the growth of the segment.
- Liver Transplant: North America and Europe are seeing an increasing number of liver transplants, directly driving the growth of the segment.
- Heart Transplant: Requiring strong immunosuppressants with specific action, heart transplants are very expensive and difficult procedures, which is driving the innovation of immunosuppressants.
- Others: Covering various transplants such as intestines, skin, tissue, and fluids that require specific immunosuppressant drugs.
Others: Immunosuppressants are used for the treatment of many allergies and non-autoimmune inflammatory diseases. This is a small segment but shows high growth potential with the discovery of new application areas for immunosuppressant drugs.

By End User

- Hospitals and Clinics: A very large segment that continues to grow, hospitals and clinics are the primary centers for the diagnosis and treatment of diseases and conditions that require immunosuppressant medication.
- Organ Transplant Centers: With the facilitation of organ transplant procedures due to the increasing number of donors and technological advances, the segment is expected to register high growth.
- Others: The segment covers the management of certain chronic diseases and life-long medication required after most transplants at homes, rehabilitation centers, and old age homes.

By Region

- Americas: Leading the global immunosuppressive drug market with the maximum number of organ transplants annually and rising prevalence of autoimmune diseases, the regional market growth can be also be attributed to technological advancements and large-scale investments in R&D. According to the US National Kidney Foundation, as of December 2016, there were 121,678 people registered for organ transplantation, including 100,791 people for kidney transplantation.
- Europe: An increase in the number of transplants and the rising prevalence of autoimmune diseases in Western Europe would ensure market growth in the region.
- Asia-Pacific: Though there are fewer people suffering from autoimmune diseases as compared to the Americas and Europe, the high population in the region is expected to drive market growth. A well-established healthcare industry is also seeing a rise in medical tourism in Asia-Pacific, furthering the demand for immunosuppressive drugs.
- Middle East & Africa: Currently the smallest regional market due to the low prevalence of autoimmune diseases and an underdeveloped organ transplant market.

Key Players

- Accord Healthcare (UK): Researching a wide variety of immunosuppressants drugs to cater to rising demand in its domestic market.
- Astella Pharma (Japan): Currently commercializing immunosuppressants with a narrow therapeutic index such as tacrolimus under the name Prograf.
- Bristol-Myers Squibb Company (US): The company’s Belatacept brand name of immunosuppressants help manage renal transplant rejection with ongoing testing for use in lung transplant rejection.
- Genzyme Co. (Switzerland): Researching drugs to primarily treat autoimmune diseases and allergic reactions, the company’s Dupixent, for example, which shows much promise in treating atopic dermatitis in adolescents.
- Hoffmann-La Roche AG (US): Focused on the development of drugs to treat atypical autoimmune
diseases, the latest drug MabThera was approved by EU legislation for the treatment of pemphigus vulgaris.

- GlaxoSmithKline PLC (UK): With a dedicated R&D wing for immune-inflammation therapy, the pharmaceutical giant has launched numerous immunosuppressants. In April 2019, it launched Benlysta, a drug to be used to treat systemic lupus erythematosus.

- Glenmark Pharmaceuticals, Inc. (India): A growing company with a large market share in the US and India, it has two immunosuppressants ready to hit the market pending approval.

- Mylan Laboratories Inc. (US): Investing in drugs to cater to the global organ transplant market, clinical trials have been successfully carried out for Mycophenolate Mofetil for the prophylaxis of kidney and liver transplant failure; the drug is currently pending approval.

- Pfizer Inc. (US): Using its vast resources, Pfizer has invested in the creation of immunosuppressive drugs for a wide range of conditions. The novel drug CP-690550 has been shown to be an effective immunosuppressant for the treatment of rheumatoid arthritis, transplant rejection, psoriasis, and other autoimmune diseases. It is currently in the development phase. The company has also developed a range of other immunosuppressants with specific applications.

- Novartis AG (Switzerland): Novartis AG offers the immunosuppressant cyclosporine that is used post liver, kidney, and heart transplant procedures. Cyclosporine works by weakening the immune system to help the patient’s body accept the new organ.

- Actavis, Inc.: Produces a wide range of immunosuppressive drugs for use in combating various autoimmune diseases.

- Zydus Cadila (India): Zydus caters to the Indian organ transplant market, often using in-licensing agreements with other companies. Its highly successful immunosuppressant Grafalon was licensed from Neovii Pharmaceuticals AG, a Swiss company.
4.2 Restraints
4.3 Opportunities

Chapter 5. Market Factor Analysis
5.1 Porter’s Five Forces Analysis
5.1.1 Bargaining Power of Suppliers
5.1.2 Bargaining Power of Buyers
5.1.3 Threat of New Entrants
5.1.4 Threat of Substitutes
5.1.5 Intensity of Rivalry
5.2 Value Chain Analysis
5.2.1 R&D & Designing
5.2.2 Manufacturing
5.2.3 Distribution & Sales
5.2.4 Post-Sales Review

Chapter 6. Global Immunosuppressive Drugs Market, by Drug Type
6.1 Overview
6.2 Calcineurin Inhibitors
Market Estimates & Forecast, by Region, 2019–2025
6.3 Corticosteroids
Market Estimates & Forecast, by Region, 2019–2025
6.4 Antiproliferative Agents
Market Estimates & Forecast, by Region, 2019–2025
6.5 mTOR Inhibitors
Market Estimates & Forecast, by Region, 2019–2025
6.6 IMDH Inhibitors
Market Estimates & Forecast, by Region, 2019–2025
6.7 Others
Market Estimates & Forecast, by Region, 2019–2025

Chapter 7. Global Immunosuppressive Drugs Market, by Route of Administration
7.1 Overview
7.2 Intravenous
Market Estimates & Forecast, by Region, 2019–2025
7.3 Oral
Market Estimates & Forecast, by Region, 2019–2025
7.4 Others
Market Estimates & Forecast, by Region, 2019–2025

Chapter 8. Global Immunosuppressive Drugs Market, by Application
8.1 Overview
8.2 Autoimmune Disease
Chapter 9. Global Immunosuppressive Drugs Market, by End User

9.1 Overview
9.2 Hospitals & Clinics
9.3 Organ Transplant Centers

Chapter 10. Global Immunosuppressive Drugs Market, by Region

10.1 Overview
10.2 Americas
10.2.1 North America
10.2.1.1 US
10.2.1.2 Canada
10.2.2 Latin America
10.3 Europe
10.3.1 Western Europe
10.3.1.1 Germany
10.3.1.2 France
10.3.1.3 Italy
10.3.1.4 Spain
10.3.1.5 UK
10.3.1.6 Rest of Western Europe
10.3.2 Eastern Europe
10.4 Asia-Pacific
10.4.1 Japan
10.4.2 China
10.4.3 India
10.4.4 Australia
10.4.5 South Korea
10.4.6 Rest of Asia-Pacific
10.5 Middle East & Africa
10.5.1 Middle East
10.5.2 Africa

Chapter 11. Company Landscape
11.1 Overview
11.2 Competitive Analysis

Chapter 12. Company Profiles
12.1 Accord Healthcare
  12.1.1 Company Overview
  12.1.2 Products/Services Offered
  12.1.3 Financial Overview
  12.1.4 Key Developments
  12.1.5 SWOT Analysis
  12.1.6 Key Strategies
12.2 Astella Pharma
  12.2.1 Company Overview
  12.2.2 Products/Services Offered
  12.2.3 Financial Overview
  12.2.4 Key Developments
  12.2.5 SWOT Analysis
  12.2.6 Key Strategies
12.3 Bristol-Myers Squibb Company
  12.3.1 Company Overview
  12.3.2 Products/Services Offered
  12.3.3 Financial Overview
  12.3.4 Key Development
  12.3.5 SWOT Analysis
  12.3.6 Key Strategies
12.4 Genzyme Co.
  12.4.1 Company Overview
  12.4.2 Products/Services Offered
  12.4.3 Financial Overview
  12.4.4 Key Development
  12.4.5 SWOT Analysis
  12.4.6 Key Strategies
12.5 F. Hoffmann-La Roche AG
  12.5.1 Company Overview
  12.5.2 Products/Services Offered
  12.5.3 Financial overview
  12.5.4 Key Developments
  12.5.5 SWOT Analysis
  12.5.6 Key Strategies
12.6 GlaxoSmithKline PLC
12.6.1 Company Overview
12.6.2 Products/Services Offered
12.6.3 Financial Overview
12.6.4 Key Developments
12.6.5 SWOT Analysis
12.6.6 Key Strategies
12.7 Glenmark Pharmaceuticals, Inc.
12.7.1 Overview
12.7.2 Products/Services Offered
12.7.3 Financial Overview
12.7.4 Key Developments
12.7.5 SWOT Analysis
12.7.6 Key Strategies
12.8 Mylan Laboratories Inc.
12.8.1 Overview
12.8.2 Products/Services Offered
12.8.3 Financial Overview
12.8.4 Key Developments
12.8.5 SWOT Analysis
12.8.6 Key Strategies
12.9 Pfizer Inc.
12.9.1 Overview
12.9.2 Products/Services Offered
12.9.3 Financial Overview
12.9.4 Key Developments
12.9.5 SWOT Analysis
12.9.6 Key Strategies
12.10 Novartis AG
12.10.1 Overview
12.10.2 Products/Services Offered
12.10.3 Financial Overview
12.10.4 Key Developments
12.10.5 SWOT Analysis
12.10.6 Key Strategies
12.11 Actavis, Inc.
12.11.1 Overview
12.11.2 Products/Services Offered
12.11.3 Financial Overview
12.11.4 Key Developments
12.11.5 SWOT Analysis
12.11.6 Key Strategies
12.12 Zydus Cadila
12.12.1 Overview
12.12.2 Products/Services Offered
12.12.3 Financial Overview
12.12.4 Key Developments
12.12.5 SWOT Analysis
LIST OF TABLES

Table 1 Global Immunosuppressive Drugs Market Synopsis, 2019–2025
Table 2 Global Immunosuppressive Drugs Market Estimates & Forecast, 2019–2025 (USD Million)
Table 3 Global Immunosuppressive Drugs Market, by Drug Type, 2019–2025 (USD Million)
Table 4 Global Immunosuppressive Drugs Market, by Route of Administration, 2019–2025 (USD Million)
Table 5 Global Immunosuppressive Drugs Market, by Application, 2019–2025 (USD Million)
Table 6 Global Immunosuppressive Drugs Market, by End User, 2019–2025 (USD Million)
Table 7 Global Immunosuppressive Drugs Market, by Region, 2019–2025 (USD Million)
Table 8 Americas: Immunosuppressive Drugs Market, by Region, 2018 & 2025
Table 9 Americas: Immunosuppressive Drugs Market, by Drug Type, 2019–2025 (USD Million)
Table 10 Americas: Immunosuppressive Drugs Market, by Route of Administration, 2019–2025 (USD Million)
Table 11 Americas: Immunosuppressive Drugs Market, by Application, 2019–2025 (USD Million)
Table 12 Americas: Immunosuppressive Drugs Market, by End User, 2019–2025 (USD Million)
Table 13 North America: Immunosuppressive Drugs Market, by Country, 2019–2025 (USD Million)
Table 14 North America: Immunosuppressive Drugs Market, by Drug Type, 2019–2025 (USD Million)
Table 15 North America: Immunosuppressive Drugs Market, by Route of Administration, 2019–2025 (USD Million)
Table 16 North America: Immunosuppressive Drugs Market, by Application, 2019–2025 (USD Million)
Table 17 North America: Immunosuppressive Drugs Market, by End User, 2019–2025 (USD Million)
Table 18 Latin America: Immunosuppressive Drugs Market, by Drug Class, 2019–2025 (USD Million)
Table 19 Latin America: Immunosuppressive Drugs Market, by Route of Administration, 2019–2025 (USD Million)
Table 20 Latin America: Immunosuppressive Drugs Market, by Application, 2019–2025 (USD Million)
Table 21 Latin America: Immunosuppressive Drugs Market, by End User, 2019–2025 (USD Million)
Table 22 Europe: Immunosuppressive Drugs Market, by Region, 2019–2025 (USD Million)
Table 23 Europe: Immunosuppressive Drugs Market, by Drug Type, 2019–2025 (USD Million)
Table 24 Europe: Immunosuppressive Drugs Market, by Route of Administration, 2019–2025 (USD Million)
Table 25 Europe: Immunosuppressive Drugs Market, by Application, 2019–2025 (USD Million)
Table 26 Europe: Immunosuppressive Drugs Market, by End User, 2019–2025 (USD Million)
Table 27 Western Europe: Immunosuppressive Drugs Market, by Country, 2019–2025 (USD Million)
Table 28 Western Europe: Immunosuppressive Drugs Market, by Drug Type, 2019–2025 (USD Million)
Table 29 Western Europe: Immunosuppressive Drugs Market, by Route of Administration, 2019–2025 (USD Million)
Table 30 Western Europe: Immunosuppressive Drugs Market, by Application, 2019–2025 (USD Million)
Table 31 Western Europe: Immunosuppressive Drugs Market, by End User, 2019–2025 (USD Million)
Table 32 Eastern Europe: Immunosuppressive Drugs Market, by Drug Type, 2019–2025 (USD Million)
Table 33 Eastern Europe: Immunosuppressive Drugs Market, by Route of Administration, 2019–2025 (USD Million)
Table 34 Eastern Europe: Immunosuppressive Drugs Market, by Application, 2019–2025 (USD Million)
Table 35 Eastern Europe: Immunosuppressive Drugs Market, by End User, 2019–2025 (USD Million)
Table 36 Asia-Pacific: Immunosuppressive Drugs Market, by Country, 2019–2025 (USD Million)
Table 37 Asia-Pacific: Immunosuppressive Drugs Market, by Drug Type, 2019–2025 (USD Million)
Table 38 Asia-Pacific: Immunosuppressive Drugs Market, by Route of Administration, 2019–2025 (USD Million)
Table 39 Asia-Pacific: Immunosuppressive Drugs Market, by Application, 2019–2025 (USD Million)
Table 40 Asia-Pacific: Immunosuppressive Drugs Market, by End User, 2019–2025 (USD Million)
Table 41 Middle East & Africa: Immunosuppressive Drugs Market, by Region, 2019–2025 (USD Million)
Table 42 Middle East & Africa: Immunosuppressive Drugs Market, by Drug Type, 2019–2025 (USD Million)
Table 43 Middle East & Africa: Immunosuppressive Drugs Market, by Route of Administration, 2019–2025 (USD Million)
Table 44 Middle East & Africa: Immunosuppressive Drugs Market, by Application, 2019–2025 (USD Million)
Table 45 Middle East & Africa: Immunosuppressive Drugs Market, by End User, 2019–2025 (USD Million)

LIST OF FIGURES

Figure 1 Research Process
Figure 2 Market Structure for the Global Immunosuppressive Drugs Market
Figure 3 Market Dynamics for the Global Immunosuppressive Drugs Market
Figure 4 Global Immunosuppressive Drugs Market Share, by Drug Type, 2018 (%)
Figure 5 Global Immunosuppressive Drugs Market Size, by Drug Type, 2018 (USD Million)
Figure 6 Global Immunosuppressive Drugs Market Share, by Route of Administration, 2018 (%)
Figure 7 Global Immunosuppressive Drugs Market Size, by Route of Administration, 2018 (USD Million)
Figure 8 Global Immunosuppressive Drugs Market Share, by Application, 2018 (%)
Figure 9 Global Immunosuppressive Drugs Market Size, by Application, 2018 (USD Million)
Figure 10 Global Immunosuppressive Drugs Market Share, by End User, 2018 (%)
Figure 11 Global Immunosuppressive Drugs Market Size, by End User, 2018 (USD Million)
Figure 12 Global Immunosuppressive Drugs Market Share, by Region, 2018 (%)
Figure 13 Americas: Immunosuppressive Drugs Market Share, by Region, 2018 (%)
Figure 14 North America: Immunosuppressive Drugs Market Share, by Country, 2018 (%)
Figure 15 Europe: Immunosuppressive Drugs Market Share, by Region, 2018 (%)
Figure 16 Western Europe: Immunosuppressive Drugs Market Share, by Country, 2018 (%)
Figure 17 Asia-Pacific: Immunosuppressive Drugs Market Share, by Country, 2018 (%)
Figure 18 Middle East & Africa: Immunosuppressive Drugs Market Share, by Region, 2018 (%)
Figure 19 Global Immunosuppressive Drugs Market: Company Share Analysis, 2018 (%)
Figure 20 Accord Healthcare: Key Financials
Figure 21 Accord Healthcare: Segmental Revenue
Figure 22 Accord Healthcare: Regional Revenue
Figure 23 Astella Pharma: Key Financials
Figure 24 Astella Pharma: Segmental Revenue
Figure 25 Astella Pharma: Regional Revenue
Figure 26 Bristol-Myers Squibb Company: Key Financials
Figure 27 Bristol-Myers Squibb Company: Segmental Revenue
Figure 28 Bristol-Myers Squibb Company: Regional Revenue
Figure 29 Genzyme Co.: Key Financials
Figure 30 Genzyme Co.: Segmental Revenue
Figure 31 Genzyme Co.: Regional Revenue
Figure 32 F. Hoffmann-La Roche AG: Key Financials
Figure 33 F. Hoffmann-La Roche AG: Segmental Revenue
Figure 34 F. Hoffmann-La Roche AG: Regional Revenue
Figure 35 GlaxoSmithKline PLC: Key Financials
Figure 36 GlaxoSmithKline PLC: Segmental Revenue
Figure 37 GlaxoSmithKline PLC: Regional Revenue
Figure 38 Glenmark Pharmaceuticals, Inc.: Key Financials
Figure 39 Glenmark Pharmaceuticals, Inc.: Segmental Revenue
Figure 40 Glenmark Pharmaceuticals, Inc.: Regional Revenue