Microbiome Therapeutics Market, 2015 - 2030

Description: The ‘Microbiome Therapeutics Market, 2015-2030’ report provides a comprehensive study on the current landscape and the future outlook of the evolving pipeline of products in this area. Imbalance in the natural microbiota are a known cause for many chronic diseases such as antibiotic associated diarrhoea (AAD), Clostridium difficile infections (CDI), irritable bowel syndrome (IBS), diabetes, Crohn's disease and ulcerative colitis.

While the field has gathered the interest of several companies, there are no approved microbiome drugs available in the market yet; FMT is the only commercially available therapy. The development pipeline of microbiome therapeutics, though, has several promising candidates that are likely to result in commercial success stories in the foreseen future.

Among other elements, the report also elaborates on new microbiome based diagnostic solutions being developed and the upcoming opportunities in this market for different stakeholders. As pharmaceutical companies continue to initiate and expand their research programs in this area, one of the key objectives outlined for this report was to understand the future potential of the market. This was done by analysing:

- The microbiome therapeutic pipeline in terms of phase of development, type of products and indications.
- The epidemiology, patient population and available treatment plans for the potential therapeutic areas in this field.
- Partnerships that have taken place in the recent past covering research and development collaborations, product development and commercialisation agreements, license agreements, acquisitions and other relevant agreements.
- Various investments and grants received by companies focused in this area.
- The likely adoption of the microbiome therapeutics, the competition posed by the current treatment plans and the expected growth rate over the coming few years.

The study provides a detailed market forecast and opportunity analysis for the short-mid term (2015-2022) and long term (2022-2030). The research, analysis and insights presented in this report include potential sales of FMT therapies and drugs in late stages of development. Our opinions and insights, presented in this study, were influenced by several discussions we conducted with experts in this area.

These included senior representatives at Assembly Biosciences, Da Volterra, Metabiomics, MicroBiome Therapeutics and Rebiotix. All actual figures have been sourced and analysed from publicly available information forums and primary research discussions. Financial figures mentioned in this report are in USD, unless otherwise specified.

Example Highlights

- Overall, we have identified more than 100 microbiome products, in clinical and preclinical stages, which are being developed as therapeutic interventions for various disease areas. A healthy 27% of the pipeline accounts for molecules in clinical development; of these, majority are in phase II.
- In addition, we have captured several start-ups and small-sized firms that have taken initiatives in developing innovative microbiome based therapeutics. Notable examples include (in alphabetical order) AOBiome, Avid Biotics, C3 Jian, Da Volterra, OpenBiome, Procarta Biosystems, Rebiotix, Ritter Pharmaceuticals, Quorum Innovations, Seres Therapeutics, Symbiotic Health, Vedanta Biosciences, Xycrobe Therapeutics.
- Several firms are also developing microbiome related diagnostics and companion diagnostics. Examples include (in alphabetical order) Admera Health, Biocartis, Enterome Bioscience, Human Longevity, Metabiomics, Microbiome Diagnostics, Viomer, Whole Biome.
- Encouraging clinical results and unexplored opportunities have yielded an intense framework of investment activity with a sizeable number of venture capitalists actively supporting the research. In fact, during 2014 and 2015, there have been investments (equity + debt) of close to USD 0.7 billion.
- The microbiome therapeutics market is anticipated to grow aggressively with a healthy annual growth rate of 73% between 2015 and 2030. In the longer term, we expect the market to continue to rise steadily with high adoption rates of existing FMTs and emergence of novel microbiome related products.
- Additional analysis suggests that metabolic disorders and gastrointestinal (GI) disorders are the key...
therapeutic areas likely to garner a significant proportion of the overall market.

Chapter Outlines:

Chapter 2 provides an executive summary of the report. It offers a high level view on where the microbiome therapeutics market is headed in the mid to long term.

Chapter 3 provides a general introduction to the underlying concepts on the human microbiota. In addition to reviewing the function of microbiota, we have also discussed key aspects of the human microbiome project and the diseases caused by imbalance in the microbiota. Further, we have highlighted the need for microbiome therapeutics along with a brief description of the existing FMT therapies.

Chapter 4 includes information on over 100 molecules that are currently in different stages of development (both clinical and preclinical/discovery). In this section, we have presented a detailed analysis of the microbiome therapeutics development pipeline including information on the phase of development, indications and the type of products. In addition, the chapter contains details on different microbiome based diagnostics, medical foods and over-the-counter (OTC) supplements that are approved or under development.

Chapter 5 provides information on the various types of probiotic and prebiotic drugs that are being developed as microbiome therapeutics. It features a detailed discussion on their mode of action, range of formulations and the different disease areas likely to benefit from the use of these drugs.

Chapter 6 highlights the promising therapeutic areas for microbiome therapeutics. These indications are the prime focus of companies developing microbiome based drugs. The chapter also highlights the epidemiological facts and currently available treatment options for each indication. These therapeutic areas include gastrointestinal (GI) disorders, inflammatory disorders, metabolic disorders and women disorders.

Chapter 7 presents details on various investments and grants received by companies focused in the area of microbiome therapeutics. The analysis highlights the growing interest of the VC community and other strategic investors in this market.

Chapter 8 features an elaborate discussion on the collaborations and partnerships that have been forged amongst players in this market. We have also discussed the various partnership models in existence and the most common forms of deals/agreements that have evolved over time.

Chapter 9 highlights the monetary opportunity presented by these therapies. The analysis highlights the likely evolution of important parameters such as the target patient population and the likely market penetration rates. We have also presented an indicative distribution of the overall market across the well-known therapeutic areas.

Chapter 10 provides detailed company and drug profiles of the leading players in the market. Each profile includes information such as the company's financial performance (wherever available), geographical presence, pipeline of microbiome therapeutics and recent collaborations.

Chapter 11 summarises the overall report. In this chapter, we provide a recap of the key takeaways and our independent opinion based on the research and analysis described in previous chapters.

Chapter 12 is a collection of interview transcripts of the discussions that were held with key stakeholders in this market. These include JP Benya (Vice President, Business Development of Assembly Biosciences), Pierre-Alain Bandinelli (Chief Business Officer of Da Volterra), Gregory J. Kuehn (Vice President, Business Development and Marketing of Metabiomics), Dr. Mark Heiman (Vice President of Research and Chief Scientific Officer of MicroBiome Therapeutics) and Lee Jones (President and CEO of Rebiotix).

Chapter 13 is an appendix, which provides tabulated data and numbers for all the figures provided in the report.

Chapter 14 is an appendix, which provides the list of companies and organisations mentioned in the report.
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