Global Respiratory Drugs Market to 2022 - Pipeline and Market Characterized by Growing Prominence of Targeted Therapies, with Asthma and Cystic Fibrosis Leading the Way

Description: Respiratory therapy area consists of indications that affect the respiratory system in different ways, such as the scarring of lung tissue and excessive production of mucus in the airways, thereby decreasing lung function. The market size for respiratory therapeutics is expected to grow strongly, from USD28.1 Billion in 2015 to USD46.6 Billion in 2022, at a compound annual growth rate (CAGR) of 7.5%.

The patent expirations of the commercially successful Advair, Symbicort, Ventolin and Spiriva will allow generics to enter the market, but the impact of these expirations will be offset by the approval of new products. Recently approved products in chronic obstructive pulmonary disease (COPD) include multiple long-acting beta-2 agonist/long-acting muscarinic antagonist (LAMA) fixed-dose combinations, some of which are forecast to generate over USD1 Billion by 2022.

Respiratory pipeline consists of 908 pipeline products, most of which are small molecules and monoclonal Antibody (mAb) products. Most of the pipeline products are at early stages of development, with Discovery and Preclinical products accounting for 64.3%. Phase I, II and III products account for 31.3%, and Pre-registration products account for a mere 2%.

In 2015, GSK was the leading company in terms of revenue generated from respiratory disorder products, accounting for 33.6% of the market, while Vertex had a small market share of only 2.8%. However, the emergence of cystic fibrosis transmembrane conductance regulator (CFTR) modulating therapies, which are considered disease modifying therapies for CF, an indication which has traditionally only had symptomatic treatments, is set to have a substantial clinical and commercial impact. There are only two of these products on the market, Kalydeco and Orkambi, both of which were developed by Vertex. They are forecast to generate USD2.8 Billion and USD6.8 Billion, respectively, by 2022, driven by strong demand for disease modifying therapy in CF. Vertex also has a Phase III candidate of the same class, which is forecast to contribute more than USD1 Billion by 2022.

The report “Global Respiratory Drugs Market to 2022 - Pipeline and Market Characterized by Growing Prominence of Targeted Therapies, with Asthma and Cystic Fibrosis Leading the Way” provides an introduction to respiratory disorders, including disease epidemiology, symptoms, pathophysiology, co-morbidities and complications and prognosis.

In particular, it provides the following analysis:

- Provides an overview of the marketed products landscape, including product profiles of key marketed products and revenue projections for each of these drugs.
- Analysis of the respiratory disorders pipeline, detailing, among other parameters, drug distribution by stage of development, molecule type and molecular target, plus an analysis of the key indications in the pipeline: asthma, chronic obstructive pulmonary disease, cystic fibrosis and idiopathic pulmonary fibrosis.
- Provides forecast projections to 2023 on a global level, with forecasts provided for the US, plus aggregate revenue forecasts of the top five EU markets (the UK, France, Germany, Italy and Spain) and Japan. Additionally, revenue forecasts for the major product categories and key players.
- Assesses the company landscape, with an analysis of the key players, the types of company involved in this therapy area, and whether this therapy area comprises a large proportion of each company’s pipeline portfolio and total revenues.
- Analysis of trends in co-development and licensing deals, relating to respiratory disorder products. Some of the most prominent deals are discussed in detail.

Companies mentioned in this report: Vertex Pharmaceuticals, GlaxoSmithKline, AstraZeneca, Roche, Boehringer Ingelheim, Novartis, Teva Pharmaceutical, Merck & Co, Sanofi, Pfizer, Kyorin Holdings, Astellas Pharma, Insmed Incorporated, Mallinckrodt, Sumitomo Dainippon Pharma, Infinity Pharmaceuticals, Bayer, Regeneron Pharmaceuticals, Almirall, Shionogi & Co, Jazz Pharmaceuticals, Orion Oyj, Par Pharmaceutical, AbbVie, UCB, Takeda, Santen Pharmaceutical, Nippon Shinyaku, Daiichi Sankyo, Meiji Seika Pharma, Johnson
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