

Erectile Dysfunction Market - Global Outlook and Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Erectile Dysfunction Market Report

The global erectile dysfunction is expected to cross USD 4.7 billion during the period 2021-2026.

The global erectile dysfunction market is expected to observe a negative growth during the forecast period on account of the decline in revenue from the ED therapeutics segment. The presence of several generic companies and the patent expiry of blockbuster ED drugs, including Viagra, Cialis, and Levitra are expected to hamper the growth of ED drugs. However, the overall market is expected to benefit from the steady growth observed in ED devices. The non-invasive nature and no adverse effects profile of shock wave therapy are the primary factors influencing the growth of the ED device market. The increasing focus of vendors in manufacturing new innovative technologies such as vibrators and magnetic therapy for the management of ED is further boosting the ED devices market. The introduction of magnetic therapy for the treatment of ED is likely to drive the demand for ED devices. However, the outbreak of the COVID-19 pandemic and the unavailability of hospitals for penile implantations hindered the ED devices market in 2020. Nevertheless, a high incidence of the disease followed by the wide availability of generic medications and advanced technological advances in ED devices are likely to boost the market during the forecast period.

The following factors are likely to contribute to the growth of the erectile dysfunction market during the forecast period:

Introduction of New ED Treatment Devices

Increase in Strategic Agreements & Collaborations

Advances in ED Drug Formulations

Increase in Incidence of ED and Other Chronic Diseases

The study considers the present scenario of the erectile dysfunction market and its market dynamics for the period 2020-2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global Erectile Dysfunction Market Segmentation

The global erectile dysfunction market research report includes a detailed segmentation by product, drugs, devices, distribution, geography. Erectile Dysfunction (ED) drugs occupy the major share of the ED drugs market due to their high recommendations by physicians and high efficiency. The advent of topical formulations and innovations in minimal invasive penile suppositories is likely to boost the market during the forecast period. Oral drugs consist of PDE-5 inhibitors, which are considered as the first line treatment option by physicians for the treatment of ED. However, the oral drugs sub-segment is experiencing negative CAGR due to the loss of patent protection.

Oral drugs are found to be more effective and safe drugs and are considered as first-line therapy in treatment of ED. Hence, these drugs account for over 94% share of the market. Innovations in oral PDE-5 inhibitors include novel oral transmucosal drug delivery through oral dispersive tablets or oral dispersible film is expected to boost the market growth during the forecast period. The high prevalence of vascular and chronic diseases such as diabetic, hypertension, and psychological disorders, etc. is likely to influence the segment growth.

Based on device type, penile implants dominate the device market, accounting for over 49% shares, followed by VCD (vacuum constriction devices), and shockwave therapy. Penile implantations are recommended when the patient fails to respond via oral PDE-5 inhibitors or penile injections. Although penile implantations are considered as the last option by physicians, their demand is increasing due to the high efficacy up to 90% satisfactory erection among patients. However, malfunctioning, erosions, infections, lack

of medical expertise about implantation and high cost of implants are expected to hamper the growth of penile implantations.

Retail pharmacies account for the largest share of the global ED drugs market.

Retail pharmacies are considered a major centers to procure medicines. Easy access to medicines and the availability of generic ED drugs via retail pharmacies are increasing the market share of retail pharmacies. Hospital pharmacies constituted over 33% shares in the market. The growing awareness of erectile dysfunction and other sex-related disorders has highly increased revenue of hospitals. Developed countries are the major contributors to hospital pharmacies as patients prefer prescribed medication for ED. However, hospital pharmacies experienced negative growth in 2020 due to the outbreak of the COVID-19 pandemic.

Products

Drugs

Devices

Drugs

Route of Administration

Oral Drugs

Topical Formulation

Penile Injections & Suppositories

Distribution

Hospital Pharmacies

Offline Retail Pharmacies

Online Channels

Devices

Penile Implants

Vacuum Therapy Devices

Shockwave Therapy

INSIGHTS BY GEOGRAPHY

The increasing focus on strategic agreements and collaborations is driving the North America ED market. The region accounted for shares of around 37% of the total erectile dysfunction market share. Factors contributing to the growth include better access to erectile dysfunction prescription as well as generic drugs, reimbursement coverage for surgeries in ED, better healthcare infrastructure, increasing in R&D innovations, high demand for ED drugs are likely to drive the market. The US is a major contributor to the North America region, accounting for over 90% of market share. Approximately 18 million men are affected with erectile dysfunction in the US. With the increase in chronic diseases, the incidence of ED is growing. Over 50% and 51.3% people with cardiovascular diseases and diabetes, respectively, are likely to experience erectile dysfunction.

Geography

North America

US

Canada

Europe

UK

Germany

France

Italy

Spain

APAC

China

India

Japan

South Korea

Australia

Latin America

Mexico

Brazil

Argentina

Middle East & Africa

Saudi Arabia

Turkey

South Africa

INSIGHTS BY VENDORS

The global ED drugs market is observed to be oligopoly in nature, wherein only few sellers occupy dominant the market share. Pfizer, Eli Lilly and Company, Bayer, Teva Pharmaceuticals, Viatris, Dong-A-Socio Holdings, and Vivus are the key players offering oral ED drugs. Although the blockbuster oral drugs of ED lost their patent protection, the

drugs market is expected to witness a sustainable growth due to the high availability of generic versions. Branded drugs offered by global players are introduced as generic drugs for treating ED. The competitiveness among vendors is significantly high because of the accessibility to a wide range of low-cost generic drugs and OTC topical drug formulations for treating ED. Companies whose patent expired are expected to face strong competition from vendors that are offering generic drugs, topical creams, and non-invasive options.

Prominent Vendors

Eli Lilly and Company

VIVUS

Pfizer

Bayer

Boston Scientific

Coloplast

Teva Pharmaceuticals

Viartis

Dong-A Socio Holdings

Other Prominent Vendors

Aurobindo Pharma

Reddy's Laboratories

Cristalia

Metuchen Pharmaceuticals

Menarini Group

SK Chemicals

Seelos Therapeutics

GlaxoSmithKline

Sanofi

Lupin

Cipla

Sandoz

Endo International

Ferring Pharmaceuticals

ADVANZ PHARMA

Alembic Pharmaceuticals

Guangzhou Pharmaceutical Holdings

iX Biopharma

Dornier MedTech

Zephyr Surgical Implants

Augusta Medical Systems

Launch Medical

Bonro Medical

Owen Mumford

Direx Group

Zimmer Medizin Systeme

MTS Medical UG

Medispec

Inceler Medical

NOVAmedtek

WIKKON

Top Quality Group

Promedon

Timm Medical Technologies

Global Life Technologies

Urology Health Store

Hims

KEY QUESTIONS ANSWERED

1. What is the market size of the erectile dysfunction market during the period 2020-2026?
2. Which new ED devices are introduced for the treatment of erectile dysfunction?
3. What are the threats faced by the existing key players in the ED industry?
4. Which distribution channels is expected to contribute highest revenue to the erectile dysfunction treatment market?
5. Which region to account for the highest incremental revenue during the forecast period?

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