

Global Hyperphosphatemia Therapeutics Market Size Study & Forecast, by Drug Class (Sevelamer, Calcium-based Phosphate Binders, Lanthanum Carbonate, Iron-based Phosphate Binders, Non-Phosphate Binders, and Others), By Distribution Channel (Hospital Pharmacies, Retail Pharmacies, and Online Pharmacies), and Regional Analysis, 2023-2030

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Abstracts

Global Hyperphosphatemia Therapeutics Market is valued at approximately USD 1.23 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 8.2% over the forecast period 2023-2030. Hyperphosphatemia treatment aims to manage elevated levels of phosphate in the blood, a condition often associated with chronic kidney disease (CKD) and other renal disorders. Treatment modalities typically include dietary modifications to limit phosphate intake, phosphate binders to reduce absorption in the gastrointestinal tract, and medications to enhance phosphate excretion through the kidneys. Phosphate binders, such as calcium-based or non-calcium-based agents, help lower phosphate levels by binding to dietary phosphate in the gut and preventing its absorption into the bloodstream. Additionally, medications like tenapanor may be used to reduce phosphate absorption in the intestines. Dialysis is often employed in advanced CKD stages to remove excess phosphate from the blood. The choice of treatment depends on the severity of hyperphosphatemia, underlying kidney function, and individual patient factors. Phosphate monitoring and management of phosphate levels are crucial to prevent complications such as cardiovascular disease, bone disorders, and soft tissue calcifications. The Hyperphosphatemia Therapeutics Market is expanding because of factors such as the growing public awareness and improved diagnostic capabilities, growth of kidney dialysis, coupled with the increasing aging populations and advancements in drug therapeutics.

In addition, the rising prevalence of chronic kidney disease (CKD) is driving the need for efficient Hyperphosphatemia treatments, which is acting as a catalyzing factor for market growth across the globe. For instance, in 2023, the U.S. Centers for Disease Control and Prevention (CDC) reported that 35.5 million individuals, comprising 14% of the U.S. populace, were afflicted by CKD. Hyperphosphatemia is prevalent among CKD and dialysis patients. Thus, the rising burden of these conditions correlate with increased Hyperphosphatemia occurrence. Thus, these aforementioned factors are propelling the growth of the Hyperphosphatemia Therapeutics Market during the estimated period. Moreover, the rising development of innovative hyperphosphatemia treatment options, as well as the increasingly implementing reimbursement policies present various lucrative opportunities over the forecast years. However, the complications from use of hyperphosphatemia therapeutics and poor medical adherence are challenging the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Hyperphosphatemia Therapeutics Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 owing to the rising population of CKD patients undergoing dialysis. As per the data released by the National Institute of Diabetes and Digestive and Kidney Disorders (NIDDK) in May 2023, approximately 808,000 individuals in the U.S. were living with End-Stage Renal Disease (ESRD), with 69% of them undergoing dialysis. This demographic trend is expected to markedly drive the demand for hyperphosphatemia therapeutics throughout the forecast period. Whereas Asia Pacific is expected to grow at the highest CAGR over the forecast years. The prevalent usage of calcium-based phosphate binders compared to developed nations are significantly propelling the market demand across the region. Also, evolving prescription trends in these regions and a notably larger population undergoing dialysis contribute significantly to the heightened demand for hyperphosphatemia treatment across Asia Pacific in the forecast period.

Major market players included in this report are:

Sanofi SE

Takeda Pharmaceutical Company Limited

Lupin Limited

Astellas Pharma Inc.

Akebia Therapeutics, Inc.

CSL Limited

Ardelyx, Inc.

Unicycive, Inc.

Amag Pharmaceuticals Inc

Akebia Therapeutics Inc.

Recent Developments in the Market:

In August 2023, Astellas Pharma Inc. and DivcoWest, a DivCore Capital Company, collaborated with the aim of launching Astellas' new life science center on Morgan Avenue in Cambridge.

In July 2023, Ardelyx obtained approval for the use of Tenapanor as a hyperphosphatemia treatment in China. This regulatory clearance has facilitated the company's global market expansion by strengthening its presence in the international healthcare landscape.

Global Hyperphosphatemia Therapeutics Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Drug Class, Distribution Channel, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Drug Class:

Sevelamer

Calcium-based Phosphate Binders

Lanthanum Carbonate

Iron-based Phosphate Binders

Non-Phosphate Binders

Others

By Distribution Channel:

Hospital Pharmacies

Retail Pharmacies

Online Pharmacies

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

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