

# **Global HIV Treatment Market: Analysis By Product (Atripla, Biktarvy, Descovy, Genovya, Odefsey, Truvada, Sunlenca (Lenacapavir), Dovato, Juluca, Tivicay, Triumeq, Cabenuva, VH184, Capsid, bNAbs, Islatravir, and Generics), By Region (The US, and EU + ROW) Size and Trends with Impact of COVID-19 and Forecast up to 2030**

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## **Abstracts**

The global HIV treatment market in 2022 stood at US\$22.38 billion, and is likely to reach US\$25.49 billion by 2030. HIV treatment, also known as antiretroviral therapy (ART), involves the use of medications to manage the human immunodeficiency virus (HIV). Antiretroviral therapy (ART) for HIV treatment is a combination of drugs that work to slow the rate at which the virus replicates within the body, preventing it from progressing to AIDS. This helps maintain the immune system's health, reduces the risk of transmission, and enhances the patient's quality of life.

In recent years, the surge in demand for HIV treatment is driven by a rise in global HIV prevalence, enhanced diagnostic capabilities, progress in treatment methodologies, and the advent of innovative drugs with higher efficacy and resistance profiles. This is further bolstered by heightened public awareness and healthcare initiatives. To counter this, UNAIDS has set in motion the Fast-Track strategy with the objective of eradicating the AIDS epidemic as a public health threat by 2030. This strategy focuses on optimized resource allocation and expedited responses, underlining its significance in achieving the Sustainable Development Goals, specifically, ensuring health and well-being for all. Despite the absence of a definitive cure for HIV at present, ongoing research and development activities offer hope for more efficient treatments in the future. The global HIV treatment market is projected to grow at a CAGR of 1.42% during the forecast

period of 2023-2030.

### Market Segmentation Analysis:

**By Product:** The market report has segmented the global HIV treatment market into seventeen segments namely, Biktarvy, Cabenuva, Sunlenca (lenacapavir), Islatravir, Genvoya, Odefsey, bNAbs, Descovy, Capsid, Dovato, Tivicay, Juluca, VH184, Triumeq, Atripla, Truvada, and Generics. In 2022, the Biktarvy segment dominates the market share in 2022, the Biktarvy, a single-tablet regimen for HIV, holds the largest market share due to its high efficacy, minimal side effects, and convenience, coupled with its proven effectiveness across diverse patient populations, making it a preferred choice for both clinicians and patients. The HIV treatment market is poised for significant advancements due to relentless research and development activities. By the end of the 2030s, this market is expected to be augmented by the launch of novel and advanced HIV treatment drugs, thereby strengthening our global response to this major health concern. The forthcoming period is expected to witness the debut of several groundbreaking products like Sunlenca (lenacapavir), VH184, Capsid, bNAbs, and Islatravir. Concurrently, the patents of numerous existing drugs such as Descovy, Tivicay, Triumeq, Juluca, and Dovato are anticipated to expire, thereby facilitating the introduction of generic substitutes in the market.

**By Region:** According to this report, the global HIV treatment market can be divided into two major regions: The US, and European Union + Rest of the World (EU + ROW).

In 2022, the US dominated the global HIV treatment market due to its broad coverage of health insurance, effective HIV awareness programs, and the presence of major pharmaceutical companies engaged in HIV research and drug development.

The US HIV treatment market is expected to grow at the fastest CAGR from 2023 to 2030 due to ongoing advancements in medical technology and pharmaceuticals, spurred by continuous research from US-based companies, are leading to the development of more effective antiretroviral drugs, fueling market expansion. Moreover, enhanced HIV screening and testing initiatives are set to increase the number of diagnosed cases, thus driving demand for treatment drugs.

### Global HIV Treatment Market Dynamics:

**Growth Drivers:** The HIV treatment market has experienced significant growth due to the development of more effective and tolerable antiretroviral treatments (ARTs),

increased availability and affordability of ARTs, and growing awareness and prevention efforts. Ongoing development of innovative medications is expected to sustain market growth, benefiting individuals worldwide by improving treatment accessibility, affordability, and quality of life, while also preventing drug resistance and promoting long-term health outcomes. This growth signifies progress in the fight against HIV and the provision of necessary treatment for improved patient outcomes. Further, the market is expected to grow owing to rising HIV prevalence, rising disposable income, increased government funding and initiatives, expansion of generic drugs, growing awareness and testing, public-private partnerships, etc. in recent years.

**Challenges:** Drug-resistant strains of HIV pose a major challenge to the global HIV treatment market, necessitating continuous research, development of new antiretroviral therapies, and monitoring of resistance trends. Adherence to treatment regimens and ensuring the quality and availability of medications are crucial to mitigate drug resistance. Addressing these challenges is vital for maintaining the effectiveness of current treatments and developing novel therapies capable of combating drug-resistant HIV strains. Additionally, other factors like stigma, discrimination, and access to treatment, loss of patent protection, etc. are other challenges to the market.

**Market Trends:** Advances in gene therapy have the potential to revolutionize the global HIV treatment market, offering more targeted and effective treatment options, potential functional cures, and improved patient outcomes. Promising candidates in development indicate significant growth opportunities and market potential, transforming the treatment landscape and enhancing the quality of life for individuals living with HIV. More trends in the market are believed to grow the HIV treatment market during the forecasted period, which may include increasing penetration of artificial intelligence, increasing adoption of telemedicine, development of long-acting injectable, focus on combination therapies, etc.

#### Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic has had a mixed impact on the global HIV treatment market, resulting in disruptions to medication supply chains and patient care, but also driving increased public health awareness, telemedicine adoption, and accelerated pharmaceutical innovation amid collaborative efforts for equitable treatment distribution. The post-COVID impact on the HIV treatment market is expected to bring improved access to care, increased innovation, greater collaboration, enhanced supply chain resilience, and a focus on achieving health equity.

## Competitive Landscape and Recent Developments:

The global HIV treatment market is consolidated, with major pharmaceutical companies like Gilead Sciences, ViiV Healthcare, and Merck leading the market with their comprehensive drug portfolios. These firms, with expansive drug portfolios, significantly shape the market. Notably, Gilead's Biktarvy and ViiV's Dovato offer effective treatment options with limited side effects. These companies continue to innovate, investing in research and development to improve patient outcomes and address persistent HIV challenges. Gilead's recent FDA application for lenacapavir, a long-acting HIV-1 capsid inhibitor, exemplifies their commitment to innovation. These ongoing efforts are instrumental in shaping the future of the global HIV treatment market.

Further, key players in the global HIV treatment market are:

Gilead Sciences, Inc.

GlaxoSmithKline Plc (ViiV Healthcare)

Merck & Co., Inc.

Abbott Laboratories

AbbVie Inc.

TEVA Pharmaceutical Industries Limited

Johnson & Johnson (Janssen Pharmaceuticals)

Boehringer Ingelheim

Cipla Limited

Viartis Inc.

Bristol-Myers Squibb Company

Hetero Drugs Limited

Smaller players and generic manufacturers contribute to accessibility and affordability, improving treatment outcomes globally. Collaborations and partnerships, such as the Medicines Patent Pool (MPP) and ViiV Healthcare, facilitate the production of affordable generic versions of HIV medications. Key generic players include Mylan, Cipla, Aurobindo Pharma, Hetero Drugs, and Sun Pharmaceutical Industries. Partnerships between pharmaceutical companies, NGOs, governments, and global health organizations drive research, development, and access to HIV treatments, ensuring broader availability and better patient care.

## Contents

### 1. EXECUTIVE SUMMARY

### 2. INTRODUCTION

#### 2.1 HIV Treatment: An Overview

##### 2.1.1 Definition of HIV Treatment

##### 2.1.2 Goals of HIV Treatment

##### 2.1.3 HIV Treatment By Medication Class

#### 2.2 HIV Treatment Segmentation: An Overview

##### 2.2.1 HIV Treatment Segmentation By Product

### 3. GLOBAL MARKET ANALYSIS

#### 3.1 Global HIV Treatment Market: An Analysis

##### 3.1.1 Global HIV Treatment Market: An Overview

##### 3.1.2 Global HIV Treatment Market by Value

##### 3.1.3 Global HIV Treatment Market by Product (Biktarvy, Genvoya, Triumeq, Dovato, Tivicay, Odefsey, Juluca, Descovy, Cabenuva, Truvada, Atripla, and Generics)

##### 3.1.4 Global HIV Treatment Market by Region (the US, and European Union + Rest of World)

#### 3.2 Global HIV Treatment Market: Product Analysis

##### 3.2.1 Global HIV Treatment Market by Product: An Overview

##### 3.2.2 Global Biktarvy HIV Treatment Market by Value

##### 3.2.3 Global Genvoya HIV Treatment Market by Value

##### 3.2.4 Global Triumeq HIV Treatment Market by Value

##### 3.2.5 Global Dovato HIV Treatment Market by Value

##### 3.2.6 Global Tivicay HIV Treatment Market by Value

##### 3.2.7 Global Odefsey HIV Treatment Market by Value

##### 3.2.8 Global Juluca HIV Treatment Market by Value

##### 3.2.9 Global Descovy HIV Treatment Market by Value

##### 3.2.10 Global Cabenuva HIV Treatment Market by Value

##### 3.2.11 Global Truvada HIV Treatment Market by Value

##### 3.2.12 Global Atripla HIV Treatment Market by Value

##### 3.2.13 Global Sunlenca (Lenacapavir) HIV Treatment Market by Value

##### 3.2.14 Global VH184 HIV Treatment Market by Value

##### 3.2.15 Global Capsid HIV Treatment Market by Value

##### 3.2.16 Global bNAbs HIV Treatment Market by Value

3.2.17 Global Islatravir HIV Treatment Market by Value

3.2.18 Global Generics HIV Treatment Market by Value

## **4. REGIONAL MARKET ANALYSIS**

4.1 The US HIV Treatment Market: An Analysis

4.1.1 The US HIV Treatment Market: An Overview

4.1.2 The US HIV Treatment Market by Value

4.1.3 The US HIV Treatment Market by Product (Biktarvy, Genvoya, Triumeq, Odefsey, Tivicay, Dovato, Juluca, Descovy, Cabenuva, Truvada, Atripla, and Generics)

4.2 The US HIV Treatment Market: Product Analysis

4.2.1 The US HIV Treatment Market by Product: An Overview

4.2.2 The US Biktarvy HIV Treatment Market by Value

4.2.3 The US Genvoya HIV Treatment Market by Value

4.2.4 The US Triumeq HIV Treatment Market by Value

4.2.5 The US Dovato HIV Treatment Market by Value

4.2.6 The US Tivicay HIV Treatment Market by Value

4.2.7 The US Odefsey HIV Treatment Market by Value

4.2.8 The US Juluca HIV Treatment Market by Value

4.2.9 The US Descovy HIV Treatment Market by Value

4.2.10 The US Cabenuva HIV Treatment Market by Value

4.2.11 The US Truvada HIV Treatment Market by Value

4.2.12 The US Atripla HIV Treatment Market by Value

4.2.13 The US Sunlenca (Lenacapavir) HIV Treatment Market by Value

4.2.14 The US VH184 HIV Treatment Market by Value

4.2.15 The US Capsid HIV Treatment Market by Value

4.2.16 The US bNAbs HIV Treatment Market by Value

4.2.17 The US Islatravir HIV Treatment Market by Value

4.2.18 The US Generics HIV Treatment Market by Value

4.3 European Union + Rest of World HIV Treatment Market: An Analysis

4.3.1 European Union + Rest of World HIV Treatment Market: An Overview

4.3.2 European Union + Rest of World HIV Treatment Market by Value

4.3.3 European Union + Rest of World HIV Treatment Market by Product (Biktarvy, Dovato, Triumeq, Tivicay, Genvoya, Odefsey, Juluca, Descovy, Cabenuva, Truvada, and Atripla)

4.4 European Union + Rest of World HIV Treatment Market: Product Analysis

4.4.1 European Union + Rest of World HIV Treatment Market by Product: An Overview

4.4.2 European Union + Rest of World Biktarvy HIV Treatment Market by Value

4.4.3 European Union + Rest of World Genvoya HIV Treatment Market by Value

- 4.4.4 European Union + Rest of World Triumeq HIV Treatment Market by Value
- 4.4.5 European Union + Rest of World Dovato HIV Treatment Market by Value
- 4.4.6 European Union + Rest of World Tivicay HIV Treatment Market by Value
- 4.4.7 European Union + Rest of World Odefsey HIV Treatment Market by Value
- 4.4.8 European Union + Rest of World Juluca HIV Treatment Market by Value
- 4.4.9 European Union + Rest of World Descovy HIV Treatment Market by Value
- 4.4.10 European Union + Rest of World Cabenuva HIV Treatment Market by Value
- 4.4.11 European Union + Rest of World Truvada HIV Treatment Market by Value
- 4.4.12 European Union + Rest of World Atripla HIV Treatment Market by Value
- 4.4.13 European Union + Rest of World Sunlenca (Lenacapavir) HIV Treatment Market by Value
- 4.4.14 European Union + Rest of World VH184 HIV Treatment Market by Value
- 4.4.15 European Union + Rest of World Capsid HIV Treatment Market by Value
- 4.4.16 European Union + Rest of World bNAbs HIV Treatment Market by Value
- 4.4.17 European Union + Rest of World Islatravir HIV Treatment Market by Value

## **5. IMPACT OF COVID-19**

- 5.1 Impact of COVID-19 on Global HIV Treatment Market
- 5.2 Post-COVID-19 Impact on Global HIV Treatment Market

## **6. MARKET DYNAMICS**

### 6.1 Growth Driver

- 6.1.1 Rising HIV Prevalence
- 6.1.2 Advancements in Antiretroviral Therapy (ART)
- 6.1.3 Rising Disposable Income
- 6.1.4 Increased Government Funding and Initiatives
- 6.1.5 Expansion of Generic Drugs
- 6.1.6 Growing Awareness and Testing
- 6.1.7 Public-private Partnerships

### 6.2 Challenges

- 6.2.1 Drug Resistance
- 6.2.2 Stigma, Discrimination, and Access to Treatment
- 6.2.3 Loss of Patent Protection

### 6.3 Market Trends

- 6.3.1 Increasing Penetration of Artificial Intelligence
- 6.3.2 Increasing Adoption of Telemedicine
- 6.3.3 Development of Long-acting Injectable



6.3.4 Advances in Gene Therapy

6.3.5 Focus on Combination Therapies

## **7. COMPETITIVE LANDSCAPE**

7.1 Global HIV Treatment Market: Competitive Landscape

7.2 Global HIV Treatment Market Players: Approved Product List

## **8. COMPANY PROFILES**

8.1 Gilead Sciences, Inc.

8.1.1 Business Overview

8.1.2 Sales by Product

8.1.3 Business Strategy

8.2 GlaxoSmithKline Plc (ViiV Healthcare)

8.2.1 Business Overview

8.2.2 Sales by Products

8.2.3 Business Strategy

8.3 Merck & Co., Inc.

8.3.1 Business Overview

8.3.2 Operating Segments

8.3.3 Business Strategy

8.4 Abbott Laboratories

8.4.1 Business Overview

8.4.2 Revenue by Category

8.4.3 Business Strategy

8.5 AbbVie Inc.

8.5.1 Business Overview

8.5.2 Operating Regions

8.5.3 Business Strategy

8.6 TEVA Pharmaceutical Industries Limited

8.6.1 Business Overview

8.6.2 Operating Segments

8.6.3 Business Strategy

8.7 Johnson & Johnson (Janssen Pharmaceuticals)

8.7.1 Business Overview

8.7.2 Business Segments

8.7.3 Business Strategy

8.8 Boehringer Ingelheim

- 8.8.1 Business Overview
- 8.8.2 Operating Business
- 8.8.3 Business Strategy
- 8.9 Cipla Limited
  - 8.9.1 Business Overview
  - 8.9.2 Operating Segments
  - 8.9.3 Business Strategy
- 8.10 Viatris Inc.
  - 8.10.1 Business Overview
  - 8.10.2 Operating Segments
  - 8.10.3 Business Strategy
- 8.11 Bristol-Myers Squibb Company
  - 8.11.1 Business Overview
  - 8.11.2 Revenue by Product
  - 8.11.3 Business Strategy
- 8.12 Hetero Drugs Limited
  - 8.12.1 Business Overview
  - 8.12.2 Business Strategy

## List Of Figures

### LIST OF FIGURES

Figure 1: Goals of HIV Treatment

Figure 2: HIV Treatment by Medication Class

Figure 3: HIV Treatment Segmentation by Product

Figure 4: Global HIV Treatment Market by Value; 2020-2022 (US\$ Billion)

Figure 5: Global HIV Treatment Market by Value; 2023-2030 (US\$ Billion)

Figure 6: Global HIV Treatment Market by Product; 2022 (Percentage, %)

Figure 7: Global HIV Treatment Market by Region; 2022 (Percentage, %)

Figure 8: Global Biktarvy HIV Treatment Market by Value, 2020-2022 (US\$ Billion)

Figure 9: Global Biktarvy HIV Treatment Market by Value, 2023-2030 (US\$ Billion)

Figure 10: Global Genvoya HIV Treatment Market by Value, 2020-2022 (US\$ Billion)

Figure 11: Global Genvoya HIV Treatment Market by Value, 2023-2030 (US\$ Billion)

Figure 12: Global Triumeq HIV Treatment Market by Value, 2020-2022 (US\$ Billion)

Figure 13: Global Triumeq HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 14: Global Dovato HIV Treatment Market by Value, 2020-2022 (US\$ Billion)

Figure 15: Global Dovato HIV Treatment Market by Value, 2023-2030 (US\$ Billion)

Figure 16: Global Tivicay HIV Treatment Market by Value, 2020-2022 (US\$ Billion)

Figure 17: Global Tivicay HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 18: Global Odefsey HIV Treatment Market by Value, 2020-2022 (US\$ Billion)

Figure 19: Global Odefsey HIV Treatment Market by Value, 2023-2030 (US\$ Billion)

Figure 20: Global Juluca HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 21: Global Juluca HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 22: Global Descovy HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 23: Global Descovy HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 24: Global Cabenuva HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 25: Global Cabenuva HIV Treatment Market by Value, 2023-2030 (US\$ Billion)

Figure 26: Global Truvada HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 27: Global Truvada HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 28: Global Atripla HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 29: Global Atripla HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 30: Global Sunlenca (Lenacapavir) HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 31: Global VH184 HIV Treatment Market by Value; 2030 (US\$ Million)

Figure 32: Global Capsid HIV Treatment Market by Value; 2027-2030 (US\$ Million)

Figure 33: Global bNABs HIV Treatment Market by Value, 2027-2030 (US\$ Million)

Figure 34: Global Islatravir HIV Treatment Market by Value; 2024-2030 (US\$ Billion)

Figure 35: Global Generics HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 36: Global Generics HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 37: The US HIV Treatment Market by Value; 2020-2022 (US\$ Billion)

Figure 38: The US HIV Treatment Market by Value; 2023-2030 (US\$ Billion)

Figure 39: The US HIV Treatment Market by Product; 2022 (Percentage, %)

Figure 40: The US Biktarvy HIV Treatment Market by Value, 2020-2022 (US\$ Billion)

Figure 41: The US Biktarvy HIV Treatment Market by Value, 2023-2030 (US\$ Billion)

Figure 42: The US Genvoya HIV Treatment Market by Value, 2020-2022 (US\$ Billion)

Figure 43: The US Genvoya HIV Treatment Market by Value, 2023-2030 (US\$ Billion)

Figure 44: The US Triumeq HIV Treatment Market by Value, 2020-2022 (US\$ Billion)

Figure 45: The US Triumeq HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 46: The US Dovato HIV Treatment Market by Value, 2020-2022 (US\$ Billion)

Figure 47: The US Dovato HIV Treatment Market by Value, 2023-2030 (US\$ Billion)

Figure 48: The US Tivicay HIV Treatment Market by Value, 2020-2022 (US\$ Billion)

Figure 49: The US Tivicay HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 50: The US Odefsey HIV Treatment Market by Value, 2020-2022 (US\$ Billion)

Figure 51: The US Odefsey HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 52: The US Juluca HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 53: The US Juluca HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 54: The US Descovy HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 55: The US Descovy HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 56: The US Cabenuva HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 57: The US Cabenuva HIV Treatment Market by Value, 2023-2030 (US\$ Billion)

Figure 58: The US Truvada HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 59: The US Truvada HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 60: The US Atripla HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 61: The US Atripla HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 62: The US Sunlenca (Lenacapavir) HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 63: The US VH184 HIV Treatment Market by Value, 2030 (US\$ Million)

Figure 64: The US Capsid HIV Treatment Market by Value, 2027-2030 (US\$ Million)

Figure 65: The US bNAbs HIV Treatment Market by Value, 2027-2030 (US\$ Million)

Figure 66: The US Islatravir HIV Treatment Market by Value, 2024-2030 (US\$ Million)

Figure 67: The US Generics HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 68: The US Generics HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 69: European Union + Rest of World HIV Treatment Market by Value; 2020-2022 (US\$ Billion)

Figure 70: European Union + Rest of World HIV Treatment Market by Value; 2023-2030 (US\$ Billion)

Figure 71: European Union + Rest of World HIV Treatment Market by Product; 2022 (Percentage, %)

Figure 72: European Union + Rest of World Biktarvy HIV Treatment Market by Value, 2020-2022 (US\$ Billion)

Figure 73: European Union + Rest of World Biktarvy HIV Treatment Market by Value, 2023-2030 (US\$ Billion)

Figure 74: European Union + Rest of World Genvoya HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 75: European Union + Rest of World Genvoya HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 76: European Union + Rest of World Triumeq HIV Treatment Market by Value, 2020-2022 (US\$ Billion)

Figure 77: European Union + Rest of World Triumeq HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 78: European Union + Rest of World Dovato HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 79: European Union + Rest of World Dovato HIV Treatment Market by Value, 2023-2030 (US\$ Billion)

Figure 80: European Union + Rest of World Tivicay HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 81: European Union + Rest of World Tivicay HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 82: European Union + Rest of World Odefsey HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 83: European Union + Rest of World Odefsey HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 84: European Union + Rest of World Juluca HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 85: European Union + Rest of World Juluca HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 86: European Union + Rest of World Descovy HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 87: European Union + Rest of World Descovy HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 88: European Union + Rest of World Cabenuva HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 89: European Union + Rest of World Cabenuva HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 90: European Union + Rest of World Truvada HIV Treatment Market by Value,

2020-2022 (US\$ Million)

Figure 91: European Union + Rest of World Truvada HIV Treatment Market by Value, 2023-2025 (US\$ Million)

Figure 92: European Union + Rest of World Atripla HIV Treatment Market by Value, 2020-2022 (US\$ Million)

Figure 93: European Union + Rest of World Atripla HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 94: European Union + Rest of World Sunlenca (Lenacapavir) HIV Treatment Market by Value, 2023-2030 (US\$ Million)

Figure 95: European Union + Rest of World VH184 HIV Treatment Market by Value, 2030 (US\$ Million)

Figure 96: European Union + Rest of World Capsid HIV Treatment Market by Value, 2027-2030 (US\$ Million)

Figure 97: European Union + Rest of World bNAbs HIV Treatment Market by Value, 2027-2030 (US\$ Million)

Figure 98: European Union + Rest of World Ilatravir HIV Treatment Market by Value, 2024-2030 (US\$ Million)

Figure 99: Global Number of HIV Patients (Living with & Newly Infected); 2021 (Million)

Figure 100: The US, and EU Number of HIV Patients (Prevalent, Diagnosed & Treated); 2021 (Million)

Figure 101: Global Coverage of Antiretroviral Treatment (ART); 2021 (Percentage, %)

Figure 102: Global Coverage of Antiretroviral Treatment (ART) Among Children & Prevention Of Mother-to-child Transmission (PMTCT); 2015- 2021 (Percentage, %)

Figure 103: Advanced Economies and Emerging Market & Developing Economies GDP Per Capita; 2018-2027 (US\$ Thousand)

Figure 104: HIV Funding from Donor Governments; 2015-2021 (US\$ Billion)

Figure 105: The US Federal Domestic Discretionary Funding for HIV/AIDS; 2021-2024 (US\$ Million)

Figure 106: Global Artificial Intelligence (AI) Market Revenues; 2020-2023 (US\$ Billion)

Table 2: Global HIV Treatment Market Players: Approved Product List; 2022

Figure 107: Gilead Sciences, Inc. Sales by Product; 2022 (Percentage, %)

Figure 108: GlaxoSmithKline Plc Sales by Products; 2022 (Percentage, %)

Figure 109: Merck & Co., Inc. Sales by Segments; 2022 (Percentage, %)

Figure 110: Abbott Laboratories Revenue by Category; 2022 (Percentage, %)

Figure 111: AbbVie Inc. Net revenue by Regions; 2022 (Percentage, %)

Figure 112: TEVA Pharmaceutical Industries Ltd., Revenues by Segment; 2021 (Percentage, %)

Figure 113: Johnson & Johnson Sales by Business Segment; 2022 (Percentage, %)

Figure 114: Boehringer Ingelheim Net Sales by Business; 2022 (Percentage, %)

Figure 115: Cipla Limited Revenue by Segment; 2022 (Percentage, %)

Figure 116: Viartis Inc. Net Sales by Segment; 2022 (Percentage, %)

Figure 117: Bristol-Myers Squibb Company Revenue by Product; 2022 (Percentage, %)

Table 1: FDA-Approved Generic Drugs For HIV Treatment; Until 2022

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