

Global Invasive Fungal Infections Market: Analysis By Molecule Class (Azoles, Echinocandins, Allylamines/Pyrimidines, Polyenes and Others), By Infection Type (Candidiasis, Aspergillosis, Cryptococcus, and Other), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028

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Abstracts

Invasive fungal infections (IFIs) are serious and potentially life-threatening infections caused by fungi that invade deep tissues, organs, or the bloodstream of the human body. These infections can occur in individuals with weakened immune systems, such as those undergoing chemotherapy or organ transplant, or individuals with certain medical conditions such as diabetes or HIV/AIDS. There are hundreds of thousands of different species of fungi, about a hundred of which can infect humans, but a limited number are lethal. According to a compilation by the Journal of Fungi (JOF), the prevalence exceeds 1 billion globally, where any variant of fungal infection has been identified. These are distributed among different fungal strains that are more or less severe for the infected person. The collective name for the most severe infections is invasive (systemic). The most common types of invasive fungal infections are candidiasis, aspergillosis, and cryptococcosis. The global invasive fungal infections market was valued at US\$US\$7.13 billion in 2022 and is expected to be worth US\$9.00 billion in 2028.

The market value is expected to grow at a CAGR of 3.96% during the forecast period of 2023-2028. The number of immunocompromised persons at high risk for fungal infections is rising globally (some 3% of the population). For these patients, high mortality rates when infected is a severe concern. Therefore, the need for more potent and safer antifungals is clear. Several promising drug candidates are now in the pipeline

for the treatment of invasive fungal infections. Furthermore, an increase in initiatives by public and private organizations to raise awareness about a variety of fungal infections is expected to expand the market for antifungal drugs.

Market Segmentation Analysis:

By Molecule Class: The report provides the bifurcation of the market into five segments based on the molecule class: Azoles, Echinocandins, Allylamines/Pyrimidines, Polyenes and Others. The Azoles molecule class segment dominated the market in 2022 with leading therapeutic agents such as Noxafil, Vfend, Diflucan, and Cresemba. Azoles' market dominance can be attributed to their broad-spectrum activity. By inhibiting fungal enzymes, these agents aid in fungistatic activity. Azoles are antifungal medications that are used to treat candidemia, blastomycosis, systemic candidiasis, and ocular fungal infections. Azoles, which are divided into triazoles and imidazoles, are also used to treat systemic fungal infections.

By Infection Type: The report further provides the segmentation based on the infection type: Candidiasis, Aspergillosis, Cryptococcus and Others. Candidiasis emerged as a prominent segment, accounting for a major share in the global market. Candidiasis is caused by a type of fungus called Candida. Candida infections settle in the bloodstream and bigger organs, especially in people with compromised immune systems, such as those with diabetes or HIV. According to the CDC, the incidence (rate of new infections) of invasive candidiasis in the US is approximately 9 per 100,000 people, or approximately 25,000. In-hospital all-cause mortality is estimated to be around 25%. Risk factors for developing invasive candidiasis include prolonged use of antibiotics, invasive procedures, and immunosuppression. The increasing use of broad-spectrum antibiotics, the aging population, and the growing prevalence of immunocompromised patients are driving the growth of invasive candidiasis.

By Region: The report provides insight into the invasive fungal infections market based on the geographical operations, namely North America, Europe, Asia Pacific, and ROW. Fungal infections are more prevalent in developing countries in terms of overall prevalence. At the same time, sales of drugs related to treatment are dominated by Europe and the US.

The North American region has emerged as a dominant player in the invasive fungal infections market, owing to several key factors. Firstly, the region has witnessed a rise in the number of cases of mucormycosis, along with the presence of major industry players, and the development of the healthcare sector. Additionally, the availability of

new anti-fungal drugs in the region has further contributed to its growth. Moreover, the increase in the aged population with a high incidence of fungal conditions, coupled with high awareness among the population pertaining to preventive and restorative treatments, has also propelled the market forward.

Asia Pacific is expected to register the highest CAGR during the forecasted period, owing to surge in prevalence of mucormycosis fungal infection that is caused by chronic disease. Inflationary income levels and rising life expectancy are the main market drivers. Additionally, as older adults are more prone to oral diseases, the region's geriatric population growth is driving up demand for invasive fungal infections. Moreover, the governments of numerous nations in the region are launching programs to offer patients coverage for invasive fungal infections, which is having a positive impact on the market.

Market Dynamics:

Growth Drivers: One of the most important factors impacting the global invasive fungal infections market is the increasing invasive fungal infections with life-threatening conditions. There are hundreds of thousands of fungus species, roughly a hundred of which can infect people, but only a few are fatal. In terms of incidence and general prevalence, emerging countries are particularly hard hit. These infections can be severe and potentially fatal, particularly in individuals with weakened immune systems, such as those with cancer, HIV/AIDS, organ transplant recipients, and patients receiving immunosuppressive therapies. They can cause severe damage to organs such as lungs, brain, liver, and blood vessels, leading to organ failure and death if not promptly diagnosed and treated. This underscores the urgent need for effective antifungal therapies to combat these life-threatening infections, thus driving the market growth. Furthermore, the market has been growing over the past few years, due to factors such as rapid urbanization, aging population, increasing healthcare expenditure, increasing government support, advancements in antifungal drug development and changing lifestyles and environmental factor.

Challenges: However, the market has been confronted with some challenges specifically, high adverse effects, usage of conventional drugs and complex and evolving fungal pathogens, etc. Invasive fungal infections are serious infections caused by fungi that penetrate deep into the body, often affecting people with weakened immune systems. Conventional drugs, such as antifungal medications, are often used to treat these infections. However, the high adverse effects and overuse of these drugs present a challenge to the invasive fungal infection market. For example, amphotericin

B, which is widely recommended for fungal infections, has a number of side effects. These include nephrotoxicity, hypokalemia, bone marrow suppression, and others, all of which have a detrimental impact on market growth.

Trends: The market is projected to grow at a fast pace during the forecast period, due to use of AI in vaccine and drug design, increase in R&D activities, advancements in diagnostic techniques and increase in usage of nanotechnology in formulation of advanced antifungal drugs. The global rise in the occurrence of fungal infections has driven producers to create enhanced formulation drugs for better clinical outcomes. This, in turn, is fuelling market expansion throughout the predicted period. As a result, producers are focused on new drug formulations that can be manufactured utilizing nanotechnology. Nanotechnology, for example, is used to treat onychomycosis (nail fungus), which causes nail deformity, discomfort, and other problems. Furthermore, manufacturers are focusing on the development of medications such as Amphotericin B, a topical nanoemulsion formulation Antifungal agent for the treatment of candidiasis and aspergillosis, which is causing the market to rise.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic has had a significant negative impact on the market for invasive fungal infections. As the healthcare system has been overwhelmed with managing the pandemic, resources and attention have been largely diverted towards addressing COVID-19, resulting in decreased focus on other medical conditions, including invasive fungal infections. One of the main challenges has been the disruption of routine medical services, including elective surgeries and diagnostic procedures, due to lockdowns, social distancing measures, and prioritization of COVID-19 patients. As a result, there has been a reduction in the number of invasive procedures and diagnostic tests, leading to decreased detection and management of invasive fungal infections.

Despite the challenges posed by the COVID-19 pandemic, the invasive fungal infections market is expected to continue its growth trajectory in the coming years. The COVID-19 pandemic has raised awareness about the risks of invasive fungal infections, particularly in patients with weakened immune systems due to COVID-19, prolonged hospitalization, and use of immunosuppressive medications. As a result, there may be an increased focus on early diagnosis and management of invasive fungal infections in post-COVID times, leading to an expansion of the invasive fungal infections market.

Competitive Landscape:

Over 72 medicines have been approved for the treatment of various types of invasive fungal infections. The majority target a wide range of fungal infections and are frequently used in tandem. Because of the early discoveries of the different classes of molecules, the original medications' patents have expired. As a result, the market is fragmented, with both generic and enhanced versions based on the same parent molecule. Key players are vying for market share through the development and commercialization of innovative antifungal drugs.

The key players in the global invasive fungal infections market are:

GlaxoSmithKline

Merck & Co., Inc.

Pfizer Inc.

Cidara Therapeutics, Inc.

Astellas Pharma Inc.

Gilead Sciences, Inc.

Novo Nordisk A/S (Xellia Pharmaceuticals)

Biosergen AB

Matinas BioPharma Holdings, Inc.

Pulmocide Ltd.

F2G Ltd.

Among the best-selling drugs is the liposomal version of amphotericin B from Gilead /Astellas Pharma. The two pharmaceutical giants, Pfizer and Merck & Co, have drugs in commercial Phase from the azole class of molecules. The most notable are Posaconazole and Voriconazole. There are several number of candidates which are under development phase. Most of the projects under development are small molecules and further related to the azoles, echi-nocandins, and several generic candidates.

However, there are also antibody molecules in early preclinical development, which are currently not on the market.?

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