

# **Global Non-Alcoholic Steatohepatitis (NASH) Market: Analysis By Drug Type (Vitamin E & Pioglitazone, Ocaliva, Elafibranor, Selonsertib & Cenicriviroc and Others), By Application Type (Treatment and Diagnosis), By Distribution Type (Retail Pharmacies, Hospital Pharmacies and Online Pharmacies), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2027**

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## **Abstracts**

The global non-alcoholic steatohepatitis (NASH) market was valued at US\$1.65 billion in 2021. The market value is projected to grow to US\$15.04 billion by 2027. Non-Alcoholic Steatohepatitis (NASH) is an inflammatory liver disease associated with excessive fat accumulation in the liver (steatosis), hepatocellular ballooning, and inflammation. Non-Alcoholic Steatohepatitis or “Silent Liver Disease” leads to scarring of the liver, a kind of liver disorder caused by long-term abuse of alcohol but mainly develops in patients who are non-alcoholic or consume very little alcohol. Non-Alcoholic steatohepatitis (NASH) is the second stage of non-alcoholic fatty liver disease (NAFLD) that has progressed to the point of liver inflammation and cell damage.

The factors such as increased investment in medical infrastructure, rising consumption of processed foods containing polyunsaturated fatty acids & fructose, increased focus on development of new drugs and many companies engaged in the launch of non-invasive diagnostic procedures, are expected to drive the overall market growth in the forecasted period. The market is anticipated to grow at a CAGR of approx. 50% during the forecasted period of 2022-2027.

### Market Segmentation Analysis:

**By Drug Type:** The report provides the bifurcation of the market into five segments based on the drug type: vitamin e & pioglitazone, ocaliva, elafibranor, selonsertib & cenicriviroc and others. In 2021, the vitamin E & pioglitazone segment held the major share of the global non-alcoholic steatohepatitis market as these two drugs are seen to be effective in improving the condition associated with NASH and with no FDA approved drugs in the market to treat NASH, these drugs are expected to be continuously demanded and recommended by medical professionals as the first line drugs for treating NASH. Elafibranor non-alcoholic steatohepatitis market is the fastest growing segment of global non-alcoholic steatohepatitis market in the forecasted period of 2023-2027 owing to positive impact of elafibranor in NASH treatment during clinical trials and drug's capability to reduce fat substance of liver, improving the conditions caused by NASH.

**By Application Type:** The report provides the bifurcation of the market into two segments based on application type: treatment and diagnosis. The non-alcoholic steatohepatitis (NASH) treatment market is both the largest and fastest growing segment of global non-alcoholic steatohepatitis (NASH) market owing to increased prevalence of NASH, expected launch of new pipeline drugs by pharmaceutical companies and development of various potential pathways for NASH treatments, including lipogenesis inhibitors, medications targeting the farnesoid X receptor axis, ASK1 inhibitors, etc.

**By Distribution Type:** The report provides the bifurcation of the market into three segments based on distribution type: retail pharmacies, online pharmacies and hospital pharmacies. Retail pharmacies non-alcoholic steatohepatitis (NASH) market is the largest and fastest segment of global non-alcoholic steatohepatitis (NASH) market owing to strong presence of drug stores & retail pharmacies, more engaging patient centric services, easy accessibility in terms of more convenient locations and better drug portfolio with more thorough information about medications and health items that can be used to treat the conditions associated with NASH.

**By Region:** The report provides insight into the non-alcoholic steatohepatitis (NASH) market based on the regions namely North America, Europe, Asia Pacific, Middle East & Africa, and Latin America. The North America non-alcoholic steatohepatitis market holds the largest share in global non-alcoholic steatohepatitis market owing to the rise in number of cases of associated chronic diseases like obesity, increasing healthcare expenditure and presence of major NASH players in the region.

Whereas, Asia Pacific non-alcoholic steatohepatitis market is expected to be the fastest growing segment of global NASH market owing to growing prevalence of NASH, advancing healthcare infrastructure and increasing investments from international NASH players in countries like China and India, having positive impact on diagnostic advancements in the region. The Asia Pacific non-alcoholic steatohepatitis market is further divided into six regions on the basis of geographical operations, namely, China, India, Japan, Australia, South Korea and Rest of Asia Pacific, where China non-alcoholic steatohepatitis market held the largest share in Asia Pacific non-alcoholic steatohepatitis market.

#### Market Dynamics:

**Growth Drivers:** The global non-alcoholic steatohepatitis market has been growing over the past few years, due to factors such as rising prevalence of non-alcoholic steatohepatitis, rising cases of associated chronic diseases, increasing adoption of sedentary lifestyle, growing health awareness etc. NASH is a chronic inflammatory liver disease and if left untreated, can progress to cirrhosis and liver cancer. In addition to having an increased risk for liver-related illness, people with NASH also tend to have a higher risk of suffering from a heart attack or stroke due to the presence of other comorbidities (when there are two or more medical conditions present) such as high blood pressure and coronary artery disease. So, with rising number of people suffering from NASH, there is an increasing demand for non-alcoholic steatohepatitis (NASH) therapeutics, boosting the growth of global non-alcoholic steatohepatitis market.

**Challenges:** However, the market growth would be negatively impacted by various challenges such as absence of low cost & definitive diagnostic methods, regulatory compliance etc. NASH is presently diagnosed using methods such as blood test, imaging or liver biopsy which are time consuming, inefficient and cumbersome diagnostic procedures. Liver biopsy is an invasive method associated with high cost, sampling errors and major risks like bleeding, pain, perforation, infection and even (on occasion) death, resulting in many patients opting out of diagnosis and hence leading to low diagnosis rate of NASH, impeding the growth of global non-alcoholic steatohepatitis market.

**Trends:** The market is projected to grow at a fast pace during the forecasted period, due to various latest trends such as integration of artificial intelligence (AI), digitalization, increased promotion of pipeline drugs, etc. Rising trend of digitalization has allowed various companies and organizations to better advertise company's recent

development about existing and upcoming drugs that are currently available in the market and reach wider consumer base in terms of spreading more awareness about the prevalence of NASH using various social media platforms, boosting the growth of the global NASH market.

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

COVID-19 brought in many changes in the world in terms of reduced productivity, loss of life, business closures, closing down of factories and organizations, and shift to an online mode of work. With lockdown policies imposed by the government to prevent the spread of virus, there was an increased adoption of sedentary lifestyle, rise in consumption of processed food containing polyunsaturated fatty acids, decreased regular exercises and increased consumption of fructose-rich diets, risk factors associated with increased likelihood of developing NASH. COVID-19 pandemic also contributed towards a rise in cardiovascular & metabolic risk factors along with appearance of new chronic pathologies, increasing the risk of developing NAFLD and NASH, having a positive effect on the market in terms of increased demand for current treatment practices, diagnostic tools and emerging drugs for the treatment of NASH. Therefore, the global impact of COVID-19 on non-alcoholic steatohepatitis market turned out to be positive.

#### Competitive Landscape:

The market for non-alcoholic steatohepatitis has been consolidated. The key players of non-alcoholic steatohepatitis market are:

Intercept Pharmaceuticals, Inc.

Novartis AG

Siemens Healthineers AG

AstraZeneca PLC

Galectin Therapeutics Inc.

GENFIT S.A.

Madrigal Pharmaceuticals, Inc.

Inventiva S.A.

ONE WAY LIVER, S.L.

Galmed Pharmaceuticals Ltd.

Cirius Therapeutics

Prometheus Laboratories Inc.

BioPredictive

Currently, there are no approved drugs for the treatment of non-alcoholic steatohepatitis (NASH) and therefore several companies are adopting organic and inorganic strategies to develop novel drugs like product launches, approvals, mergers and acquisitions. For instance, On May 27, 2021, ONE WAY LIVER, S.L. (OWL) announced that the company entered into an agreement with Sagimet Biosciences to use OWL's Metabolomics Technology in Sagimet's TVB-2640 Phase 2b Clinical NASH Trial FASCINATE-2.

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