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Europe Sickle Cell Disease Treatment Market - 2025-2033

https://marketpublishers.com/r/E467F653E5E4EN.html
Date: May 2025
Pages: 148
Price: US$ 3,750.00 (Single User License)
ID: E467F653E5E4EN

Abstracts

Overview

The Europe sickle cell disease treatment market size reached US$ 883.26 million in 2024 and is expected to reach US$ 2,492.84 million by 2033, growing at a CAGR of 15.7% during the forecast period 2025-2033.

Sickle Cell Disease (SCD) is a group of inherited red blood cell disorders characterized by the production of abnormal hemoglobin, known as hemoglobin S. Hemoglobin is the protein in red blood cells responsible for carrying oxygen throughout the body. In SCD, the hemoglobin S causes the red blood cells to assume a rigid, crescent or "sickle" shape, which is markedly different from the usual round, flexible shape of normal red blood cells.

Sickle cell disease treatment refers to the medical management strategies used to alleviate the symptoms, prevent complications, and improve the quality of life for individuals with sickle cell disease. Since SCD is a genetic, lifelong condition, the treatment primarily focuses on managing the disease's symptoms, reducing the frequency and severity of pain crises, preventing organ damage, and addressing complications that arise from the disease.

Market Dynamics: Drivers & Restraints

Rising novel drug development activities and regulatory approvals are significantly driving the market growth

Sickle cell disease is one of the current burdens of disease, with a rising number of

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prevalent cases in Europe. Despite the higher number of cases, the treatment options are limited to a handful of drugs and expensive blood transfusions, and bone marrow transplantations. To tackle the high unmet demands, many innovators and market players in Europe are investing in rigorous R&D activities and are launching advanced therapies for patients. These advanced therapies include gene editing therapies, pyruvate kinase inhibitors, erythropoiesis-stimulating agents, etc.

For instance, in April 2024, Bristol Myers Squibb announced that the European Commission (EC) expanded approval of Reblozyl (luspatercept) to include the first-line treatment of adult patients with transfusion-dependent anemia due to very low, low, and intermediate-risk myelodysplastic syndromes (MDS). This approval of Reblozyl covers all EU member states. With this approval for Reblozyl as a first-line treatment for anemia in adults with lower-risk MDS, more patients in the EU will have the potential to become transfusion independent for longer periods compared to the current options available.

Product recalls and discrepancies in distribution are hampering the market growth

The treatment options for sickle cell disease are limited, and any discrepancies in the product distribution or product recalls may hinder the market growth in Europe. Once a therapy has been approved, the adoption rate is high in conditions with high unmet needs. Manufacturers must ensure a regular supply of medicine to treat these patients. Any disruption can lead to decreased adoption and hindrance of the overall market.

Product Recalls often raise concerns about the safety and efficacy of certain drugs, leading to reduced patient and healthcare provider confidence in the availability and reliability of treatments. This can delay patient adoption of certain therapies and create hesitancy regarding newly approved products.

For instance, in September 2024, EMA’s human medicines committee (CHMP) recommended suspending the marketing authorisation for the sickle cell disease medicine Oxbryta (voxelotor); this measure has been taken as a precaution while a review of emerging data is ongoing.

Recalls can damage the reputation of pharmaceutical companies, making it harder for them to gain regulatory approval for new products. It may also lead to the reluctance of healthcare providers to prescribe these drugs due to safety concerns.

Segment Analysis

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The Europe sickle cell disease treatment market is segmented based on disease type and treatment type.

Treatment Type:

The gene therapy segment is expected to dominate the Europe sickle cell disease treatment market with the highest market share

Gene therapy is a revolutionary treatment option for sickle cell disease and is considered the ultimate cure. They act on the root cause, modifying the genes either by gene addition, editing, or removal. The pathophysiology of sickle cell disease lies in the inheritance of mutated genes from parents, and in such conditions, gene therapy comes to the rescue.

Currently, only one gene therapy has been approved in Europe for use in sickle cell disease, and it is notably Casgevy. Casgevy (exagamglogene autotemcel), co-developed by Vertex Pharmaceuticals Incorporated and CRISPR Therapeutics, is a CRISPR/Cas9-technology-based cellular gene therapy consisting of autologous CD34+ Hematopoietic stem cells (HSCs) edited at the erythroid-specific enhancer region of the BCL11A gene to reduce BCL11A expression in erythroid lineage cells, leading to increased fetal hemoglobin (HbF) protein production. Casgevy is prepared from the patient's hematopoietic stem cells and administered as an HSC transplant.

This gene therapy is backed by favorable scientific evidence that demonstrates a safety and efficacy profile. The manufacturers of this gene therapy are actively involved in regulatory submissions across Europe. The adoption rate for this gene therapy is expected to pick up in 2025 and is expected to experience significant growth in the forecast period. Moreover, there are two more potential gene therapies in the pipeline being developed by Beam Therapeutics and Editas Medicine, which are anticipated to make a market entry in this decade and contribute to the overall segment growth.

Competitive Landscape

Top companies in the Europe sickle cell disease treatment market include Novartis AG, Vertex Pharmaceuticals Incorporated, Emmaus Medical, Inc., Bristol-Myers Squibb Company, CHIESI FARMACEUTICI S.p.A., Teva Pharmaceutical Industries Ltd., and others.

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The Europe sickle cell disease treatment market report delivers a detailed analysis with 24 key tables, more than 19 visually impactful figures, and 148 pages of expert insights, providing a complete view of the market landscape.

Target Audience 2024

Manufacturers: Pharmaceutical, Medical Device, Biotech Companies, Contract Manufacturers, Distributors, Hospitals.

Regulatory & Policy: Compliance Officers, Government, Health Economists, Market Access Specialists.

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