

Global Infectious Disease Treatment Market - 2025 -2033

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Abstracts

Infectious Diseases Treatment Market Size & Industry Outlook

The global infectious diseases treatment market size reached US\$ 189.09 Billion in 2024 from US\$ 182.65 Billion in 2023 and is expected to reach US\$ 264.75 Billion by 2033, growing at a CAGR of 3.9% during the forecast period 2025-2033. The market is witnessing strong growth driven by the rising global burden of antimicrobial resistance (AMR), which is predicted to cause 1.91 million annual deaths will be caused by 2050, and is pushing governments and pharma companies to invest in novel antibiotics and stewardship programs.

At the same time, the pandemic accelerated innovation in antivirals and vaccines, with products like Pfizer's Paxlovid gaining FDA approval for high-risk COVID-19 patients and demonstrating the commercial viability of rapid-response therapies. Preventive biologics are also reshaping the landscape, for instance, AstraZeneca and Sanofi's Beyfortus (nirsevimab) for RSV protection in infants opened a new monoclonal prophylaxis market. Together, these dynamics, such as AMR-driven demand, breakthrough antivirals, novel monoclonals, and platform-based vaccine expansion, are fueling sustained R&D pipelines, regulatory support, and procurement programs that underpin market growth.

Key Market Highlights

North America dominates the infectious diseases treatment market with the largest revenue share of 43.17% in 2024.

The Asia Pacific is the fastest-growing region and is expected to grow at the

fastest CAGR of 5.2% over the forecast period.

Based on infection type, the viral infections segment led the market with the largest revenue share of 44.71% in 2024.

The major market players in the infectious disease treatment market are Pfizer Inc., AbbVie, Gilead Sciences, Inc., Merck & Co., Inc., Sandoz Group AG, B. Braun SE, Bayer AG, AstraZeneca, and Novartis AG, among others.

Market Dynamics

Drivers: The escalating antimicrobial resistance (AMR) crisis is significantly driving the infectious diseases treatment market growth

The escalating antimicrobial resistance (AMR) crisis is one of the most powerful growth drivers of the infectious disease treatment market, as resistance to existing therapies is rendering many standard antibiotics ineffective and creating urgent demand for new options. The World Health Organization (WHO) lists antimicrobial resistance as one of the top global public health and development threats. It is estimated that AMR was directly responsible for 1.2 million deaths worldwide in 2019 and that is likely to rise to 1.9 million annual deaths by 2050. Review on Antimicrobial Resistance, commissioned by the UK Government and Wellcome Trust and published in 2016, estimated that without intervention, the number of deaths associated with AMR globally will rise to 10 million by 2050 surpassing cancer as a leading cause of mortality.

Pharma companies are responding with novel antibiotic combinations and next-line therapies such as Pfizer's Zavicefta (ceftazidime–avibactam) and Merck's Zerbaxa (ceftolozane–tazobactam) have been approved for multidrug-resistant Gram-negative infections, offering new hope where older drugs fail. Similarly, Shionogi's Fetroja (cefiderocol), approved for carbapenem-resistant infections, represents a breakthrough iron-chelating mechanism to overcome resistance. As a result, AMR has transformed from a clinical challenge into a commercial driver, stimulating continuous investment, regulatory acceleration, and product innovation that are significantly expanding the infectious disease treatment market.

Restraints: Rapid mutation and resistance of pathogens are hampering the growth of the market

Rapid mutation and resistance of pathogens act as a major restraint on the infectious disease treatment market by undermining the long-term effectiveness and commercial lifecycle of drugs and vaccines. Bacteria, viruses, and fungi evolve quickly, rendering therapies obsolete within a few years of launch and discouraging sustained investment. In viral diseases, constant mutations of influenza strains reduce the effectiveness of seasonal vaccines, requiring annual reformulation and limiting durable protection. A more recent instance is SARS-CoV-2, where rapid variant emergence reduced the efficacy of both monoclonal antibody treatments like Regeneron's REGEN-COV and some first-generation vaccines, leading to product withdrawals and declining revenues.

Similarly, antifungal agents face rising resistance in *Candida auris*, a pathogen now classified as a serious global health threat by the CDC. These frequent resistance patterns increase costs, shorten product lifecycles, and force companies to invest continuously in pipeline updates without guaranteed returns. For healthcare systems, this creates procurement challenges, as drugs once considered gold standards quickly lose clinical utility. Consequently, the unpredictability of pathogen evolution hampers market stability, restricts long-term profitability, and makes infectious disease therapeutics less attractive compared to chronic disease segments with more predictable treatment outcomes.

Infectious Diseases Treatment Market, Segment Analysis

The global infectious diseases treatment market is segmented based on infection type, drug class, distribution channel, and region.

Infection Type: The viral infections segment is dominating the infectious diseases treatment market with a 44.71% share in 2024

The viral infections segment dominates the infectious disease treatment market primarily due to the high prevalence, chronic nature, and significant economic burden of viral diseases globally. Chronic viral infections such as HIV, hepatitis B and C, and seasonal infections like influenza contribute to sustained demand for long-term therapies, while the COVID-19 pandemic further accelerated market expansion through emergency antiviral and vaccine development. High-cost therapeutics and vaccines have amplified revenue potential, with products like Gilead's Biktarvy and Truvada for HIV, ViiV Healthcare's Juluca, and Merck's Keytruda-adjacent antivirals addressing chronic viral infections, generating high annual sales.

The rapid development and commercial success of mRNA vaccines, such as

Moderna's mRNA-1273 and Pfizer-BioNTech's BNT162b2 for COVID-19, showcased the potential of platform-based viral therapeutics, opening avenues for influenza, RSV, and other viral vaccines. Additionally, antiviral drugs like Pfizer's Paxlovid and Merck's Lagevrio (molnupiravir) provided effective outpatient treatment for high-risk COVID-19 patients, driving emergency procurement and high uptake in multiple regions. High investments in next-generation antiviral platforms, coupled with the need for rapid response to emerging viral outbreaks, maintain viral infections as the highest contributor in the market.

The bacterial infections segment is the fastest-growing in the infectious disease treatment market, with a 31.79% share in 2024

The bacterial infections segment is the fastest-growing in the infectious disease treatment market due to the urgent global threat of antimicrobial resistance (AMR), which has rendered many existing antibiotics ineffective and created high demand for novel therapies. Multidrug-resistant (MDR) Gram-negative and Gram-positive infections, including hospital-acquired infections like carbapenem-resistant Enterobacteriaceae (CRE), have accelerated the need for advanced antibacterial agents.

Approved products driving growth include Pfizer's Zavicefta (ceftazidime–avibactam) and Merck's Zerbaxa (ceftolozane–tazobactam), which treat complicated urinary tract and intra-abdominal infections caused by MDR bacteria. Additionally, Shionogi's Fetroja (cefiderocol), a siderophore cephalosporin, addresses carbapenem-resistant infections, demonstrating innovative mechanisms to overcome resistance. The rising incidence of resistant bacterial infections globally, combined with higher treatment costs for advanced antibiotics, has accelerated revenue growth. Furthermore, emerging therapies such as bacteriophage-based treatments and adjunctive antimicrobial peptides are expanding the pipeline, positioning bacterial infections as the fastest-growing segment despite historical challenges in commercializing antibiotics.

Geographical Analysis

North America is expected to dominate the global infectious diseases treatment market with a 43.17% in 2024

North America dominates the global infectious disease treatment market due to a combination of strong regulatory infrastructure, advanced R&D capabilities, and a high prevalence of both chronic and acute infectious diseases. The region's dominance is largely driven by the United States. The combination of high per capita healthcare

spending, strong regulatory support, rapid adoption of innovative therapies, and ongoing AMR-driven demand ensures North America retains a dominant position in the global infectious disease treatment market. This dominance is expected to continue, underpinned by continued innovation, government incentives, and strong infrastructure for both acute and chronic infectious disease management.

US Infectious Diseases Treatment Market Trends

High prevalence of chronic viral infections, such as HIV and hepatitis C, fuels sustained demand for antiviral therapies, with FDA-approved products like Gilead's Biktarvy, ViiV Healthcare's Juluca, and Merck's Keytruda-adjacent antivirals generating billions in annual revenue. The COVID-19 pandemic further reinforced North America's leadership, with rapid regulatory approvals and mass vaccination campaigns for mRNA vaccines, including Pfizer-BioNTech's BNT162b2 and Moderna's mRNA-1273, alongside emergency-use antivirals such as Pfizer's Paxlovid and Merck's Lagevrio (molnupiravir).

In bacterial infections, the US benefits from both a high incidence of hospital-acquired multidrug-resistant infections and accelerated access to novel antibiotics, exemplified by FDA-approved therapies like Pfizer's Zavicefta (ceftazidime-avibactam) and Merck's Zerbaxa (ceftolozane-tazobactam) targeting multidrug-resistant Gram-negative pathogens. The US also leads in funding and adoption of advanced biologics, monoclonal antibodies, and next-generation vaccines, including prophylactic RSV monoclonals like Sanofi/AstraZeneca's Beyfortus (nirsevimab).

The Asia Pacific region is the fastest-growing region in the global infectious diseases treatment market, with a CAGR of 5.2% in 2024

The Asia-Pacific region is the fastest-growing market for infectious disease treatments, driven by a combination of high disease burden, rising government investment, and increasing access to innovative therapies. The region bears a significant share of global infectious diseases, including tuberculosis, malaria, HIV, and multidrug-resistant bacterial infections, creating strong demand for both therapeutics and vaccines. Rapid economic growth in countries like China, India, and Southeast Asian nations has improved healthcare access and affordability, while rising awareness and government-led immunization programs are accelerating vaccine adoption.

The prevalence of multidrug-resistant infections has also stimulated demand for advanced antibiotics such as Shionogi's Fetroja (cefiderocol) and hospital-targeted

therapies in urban centers. Public-private partnerships and global initiatives, including WHO and Gavi-supported vaccination programs, are further expanding reach in both urban and rural populations. Collectively, the Asia-Pacific is fueled by growing disease prevalence, increasing awareness, and rapid adoption of new treatment platforms. These factors position the region as the fastest-growing hub for infectious disease treatments, particularly in vaccines, antivirals, and novel antibiotics addressing resistant pathogens.

Europe Infectious Diseases Treatment Market Trends

The infectious disease treatment market in Europe is experiencing steady growth, driven by rising antimicrobial resistance (AMR) and robust adoption of innovative therapeutics and vaccines. AMR is a significant concern, with the European Centre for Disease Prevention and Control (ECDC) reporting approximately 35,000 deaths annually due to resistant infections, prompting increased investment in novel antibiotics and stewardship programs. European regulators, particularly the European Medicines Agency (EMA), have accelerated approvals for high-value therapies, such as Pfizer's Zavicefta (ceftazidime-avibactam) and Shionogi's Fetroja (cefiderocol) for multidrug-resistant Gram-negative infections, and Gilead's Biktarvy for HIV management.

Vaccine uptake has surged with EMA-approved products like Pfizer-BioNTech's BNT162b2, Moderna's mRNA-1273, and Sanofi Pasteur's Vaxigrip Tetra influenza vaccine, supported by EU immunization programs and COVID-19 response campaigns. The region also emphasizes preventive biologics, exemplified by Beyfortus (nirsevimab) for RSV prophylaxis in infants, expanding the market for long-acting monoclonals. Europe's aging population, rising chronic viral infections, and increasing prevalence of hospital-acquired resistant infections create sustained demand for high-cost, advanced therapies are driving consistent market growth, with Europe holding a significant share in both antibacterial and antiviral segments, while positioning itself as a hub for next-generation vaccines and biologics.

Competitive Landscape

Top companies in the infectious diseases treatment market include Pfizer Inc., AbbVie, Gilead Sciences, Inc., Merck & Co., Inc., Sandoz Group AG, B. Braun SE, Bayer AG, AstraZeneca, and Novartis AG, among others.

The global infectious diseases treatment market report delivers a detailed analysis with 59 key tables, more than 54 visually impactful figures, and 159 pages of expert insights,

providing a complete view of the market landscape.

Contents

1. MARKET INTRODUCTION AND SCOPE

- 1.1. Objectives of the Report
- 1.2. Report Coverage & Definitions
- 1.3. Report Scope

2. EXECUTIVE INSIGHTS AND KEY TAKEAWAYS

- 2.1. Market Highlights and Strategic Takeaways
- 2.2. Key Trends and Future Projections
- 2.3. Snippet by Infection Type Snippet by Drug Class
- 2.4. Snippet by Distribution Channel
- 2.5. Snippet by Region

3. DYNAMICS

- 3.1. Impacting Factors
 - 3.1.1. Drivers
 - 3.1.1.1. Escalating Antimicrobial Resistance (AMR) Crisis
 - 3.1.1.2. Shift Toward Preventive Biologics and Monoclonal Antibodies
 - 3.1.2. Restraints
 - 3.1.2.1. Rapid Mutation and Resistance of Pathogens
 - 3.1.2.2. Public Perception and Vaccine Hesitancy
 - 3.1.3. Opportunity
 - 3.1.3.1. Next-Generation AMR-Focused Therapeutics
 - 3.1.3.2. mRNA and Next-Gen Vaccine Platforms Beyond COVID-19
 - 3.1.4. Impact Analysis

4. STRATEGIC INSIGHTS AND INDUSTRY OUTLOOK

- 4.1. Market Leaders and Pioneers
 - 4.1.1. Emerging Pioneers and Prominent Players
 - 4.1.2. Established Leaders with the Largest Marketing Brand
 - 4.1.3. Market Leaders with Established Products
- 4.2. Latest Developments and Breakthroughs
- 4.3. Regulatory and Reimbursement Landscape
 - 4.3.1. North America

- 4.3.2. Europe
- 4.3.3. Asia Pacific
- 4.3.4. South America
- 4.3.5. Middle East & Africa
- 4.4. Porter's Five Forces Analysis
- 4.5. Patent Analysis
- 4.6. Unmet Needs and Gaps
- 4.7. Recommended Strategies for Market Entry and Expansion
- 4.8. Pricing Analysis and Price Dynamics

5. INFECTIOUS DISEASES TREATMENT MARKET, BY INFECTION TYPE

- 5.1. Introduction
 - 5.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Infection Type
 - 5.1.2. Market Attractiveness Index, By Infection Type
- 5.2. Viral Infections*
 - 5.2.1. Introduction
 - 5.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)
- 5.3. Bacterial Infections
- 5.4. Fungal Infections
- 5.5. Parasitic Infections

6. INFECTIOUS DISEASES TREATMENT MARKET, BY DRUG CLASS

- 6.1. Introduction
 - 6.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Drug Class
 - 6.1.2. Market Attractiveness Index, By Drug Class
- 6.2. Antibacterials*
 - 6.2.1. Introduction
 - 6.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)
- 6.3. Antivirals
- 6.4. Antifungals
- 6.5. Antiparasitic Drugs
- 6.6. Others

7. INFECTIOUS DISEASES TREATMENT MARKET, BY DISTRIBUTION CHANNEL

- 7.1. Introduction
 - 7.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Distribution Channel

- 7.1.2. Market Attractiveness Index, By Distribution Channel
- 7.2. Hospital Pharmacies*
 - 7.2.1. Introduction
 - 7.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)
- 7.3. Retail Pharmacies
- 7.4. Online Pharmacies

8. INFECTIOUS DISEASES TREATMENT MARKET, BY REGIONAL MARKET ANALYSIS AND GROWTH OPPORTUNITIES

- 8.1. Introduction
 - 8.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Region
 - 8.1.2. Market Attractiveness Index, By Region
- 8.2. North America
 - 8.2.1. Introduction
 - 8.2.2. Key Region-Specific Dynamics
 - 8.2.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Infection Type
 - 8.2.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Drug Class
 - 8.2.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Distribution Channel
 - 8.2.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country
 - 8.2.6.1. U.S.
 - 8.2.6.2. Canada
 - 8.2.6.3. Mexico
- 8.3. Europe
 - 8.3.1. Introduction
 - 8.3.2. Key Region-Specific Dynamics
 - 8.3.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Infection Type
 - 8.3.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Drug Class
 - 8.3.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Distribution Channel
 - 8.3.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country
 - 8.3.6.1. Germany
 - 8.3.6.2. UK
 - 8.3.6.3. France
 - 8.3.6.4. Spain
 - 8.3.6.5. Italy
 - 8.3.6.6. Rest of Europe
- 8.4. Asia-Pacific
 - 8.4.1. Introduction
 - 8.4.2. Key Region-Specific Dynamics

- 8.4.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Infection Type
- 8.4.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Drug Class
- 8.4.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Distribution Channel
- 8.4.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country
 - 8.4.6.1. China
 - 8.4.6.2. India
 - 8.4.6.3. Japan
 - 8.4.6.4. South Korea
 - 8.4.6.5. Rest of Asia-Pacific

8.5. South America

- 8.5.1. Introduction
- 8.5.2. Key Region-Specific Dynamics
- 8.5.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Infection Type
- 8.5.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Drug Class
- 8.5.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Distribution Channel
- 8.5.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country
 - 8.5.6.1. Brazil
 - 8.5.6.2. Argentina
 - 8.5.6.3. Rest of South America

8.6. Middle East and Africa

- 8.6.1. Introduction
- 8.6.2. Key Region-Specific Dynamics
- 8.6.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Infection Type
- 8.6.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Drug Class
- 8.6.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Distribution Channel

9. COMPETITIVE LANDSCAPE AND MARKET POSITIONING

- 9.1. Competitive Overview and Key Market Players
- 9.2. Market Share Analysis and Positioning Matrix
- 9.3. Strategic Partnerships, Mergers & Acquisitions
- 9.4. Key Developments in Product Portfolios and Innovations
- 9.5. Company Benchmarking

10. COMPANY PROFILES

- 10.1. Pfizer Inc.*
 - 10.1.1. Company Overview
 - 10.1.2. Product Portfolio

- 10.1.2.1. Product Description
- 10.1.2.2. Product Key Performance Indicators (KPIs)
- 10.1.3. Financial Overview
 - 10.1.3.1. Company Revenue
 - 10.1.3.2. Geographical Revenue Shares
 - 10.1.3.3. Revenue Forecasts
- 10.1.4. Key Developments
 - 10.1.4.1. Mergers & Acquisitions
 - 10.1.4.2. Key Product Development Activities
 - 10.1.4.3. Regulatory Approvals, etc.
 - 10.1.4.4. SWOT Analysis
- 10.2. AbbVie
- 10.3. Gilead Sciences, Inc.
- 10.4. Merck & Co., Inc.
- 10.5. Sandoz Group AG
- 10.6. B. Braun SE
- 10.7. Bayer AG
- 10.8. AstraZeneca
- 10.9. Novartis AG (LIST NOT EXHAUSTIVE)

11. ASSUMPTIONS AND RESEARCH METHODOLOGY

- 11.1. Data Collection Methods
- 11.2. Data Triangulation
- 11.3. Forecasting Techniques
- 11.4. Data Verification and Validation

12. APPENDIX

- 12.1. About Us and Services
- 12.2. Contact Us

List Of Tables

LIST OF TABLES

Table 1 Global Infectious Diseases Treatment Market Value, By Infection Type, 2025, 2029 & 2033 (US\$ Billion)

Table 2 Global Infectious Diseases Treatment Market Value, By Drug Class, 2025, 2029 & 2033 (US\$ Billion)

Table 3 Global Infectious Diseases Treatment Market Value, By Distribution Channel, 2025, 2029 & 2033 (US\$ Billion)

Table 4 Global Infectious Diseases Treatment Market Value, By Region, 2025, 2029 & 2033 (US\$ Billion)

Table 5 Global Infectious Diseases Treatment Market Value, By Infection Type, 2025, 2029 & 2033 (US\$ Billion)

Table 6 Global Infectious Diseases Treatment Market Value, By Infection Type, 2022-2033 (US\$ Billion)

Table 7 Global Infectious Diseases Treatment Market Value, By Drug Class, 2025, 2029 & 2033 (US\$ Billion)

Table 8 Global Infectious Diseases Treatment Market Value, By Drug Class, 2022-2033 (US\$ Billion)

Table 9 Global Infectious Diseases Treatment Market Value, By Distribution Channel, 2025, 2029 & 2033 (US\$ Billion)

Table 10 Global Infectious Diseases Treatment Market Value, By Distribution Channel, 2022-2033 (US\$ Billion)

Table 11 Global Infectious Diseases Treatment Market Value, By Region, 2025, 2029 & 2033 (US\$ Billion)

Table 12 Global Infectious Diseases Treatment Market Value, By Region, 2022-2033 (US\$ Billion)

Table 13 North America Infectious Diseases Treatment Market Value, By Infection Type, 2022-2033 (US\$ Billion)

Table 14 North America Infectious Diseases Treatment Market Value, By Drug Class, 2022-2033 (US\$ Billion)

Table 15 North America Infectious Diseases Treatment Market Value, By Distribution Channel, 2022-2033 (US\$ Billion)

Table 16 North America Infectious Diseases Treatment Market Value, By Country, 2022-2033 (US\$ Billion)

Table 17 Europe Infectious Diseases Treatment Market Value, By Infection Type, 2022-2033 (US\$ Billion)

Table 18 Europe Infectious Diseases Treatment Market Value, By Drug Class,

2022-2033 (US\$ Billion)

Table 19 Europe Infectious Diseases Treatment Market Value, By Distribution Channel, 2022-2033 (US\$ Billion)

Table 20 Europe Infectious Diseases Treatment Market Value, By Country, 2022-2033 (US\$ Billion)

Table 21 Asia-Pacific Infectious Diseases Treatment Market Value, By Infection Type, 2022-2033 (US\$ Billion)

Table 22 Asia-Pacific Infectious Diseases Treatment Market Value, By Drug Class, 2022-2033 (US\$ Billion)

Table 23 Asia-Pacific Infectious Diseases Treatment Market Value, By Distribution Channel, 2022-2033 (US\$ Billion)

Table 24 Asia-Pacific Infectious Diseases Treatment Market Value, By Country, 2022-2033 (US\$ Billion)

Table 25 South America Infectious Diseases Treatment Market Value, By Infection Type, 2022-2033 (US\$ Billion)

Table 26 South America Infectious Diseases Treatment Market Value, By Drug Class, 2022-2033 (US\$ Billion)

Table 27 South America Infectious Diseases Treatment Market Value, By Distribution Channel, 2022-2033 (US\$ Billion)

Table 28 South America Infectious Diseases Treatment Market Value, By Country, 2022-2033 (US\$ Billion)

Table 29 Middle East and Africa Infectious Diseases Treatment Market Value, By Infection Type, 2022-2033 (US\$ Billion)

Table 30 Middle East and Africa Infectious Diseases Treatment Market Value, By Drug Class, 2022-2033 (US\$ Billion)

Table 31 Middle East and Africa Infectious Diseases Treatment Market Value, By Distribution Channel, 2022-2033 (US\$ Billion)

Table 32 Middle East and Africa Infectious Diseases Treatment Market Value, By Country, 2022-2033 (US\$ Billion)

Table 33 Pfizer Inc.: Overview

Table 34 Pfizer Inc.: Product Portfolio

Table 35 Pfizer Inc.: Key Developments

Table 36 AbbVie: Overview

Table 37 AbbVie: Product Portfolio

Table 38 AbbVie: Key Developments

Table 39 Gilead Sciences, Inc.: Overview

Table 40 Gilead Sciences, Inc.: Product Portfolio

Table 41 Gilead Sciences, Inc.: Key Developments

Table 42 Merck & Co., Inc.: Overview

Table 43 Merck & Co., Inc.: Product Portfolio
Table 44 Merck & Co., Inc.: Key Developments
Table 45 Sandoz Group AG: Overview
Table 46 Sandoz Group AG: Product Portfolio
Table 47 Sandoz Group AG: Key Developments
Table 48 B. Braun SE: Overview
Table 49 B. Braun SE: Product Portfolio
Table 50 B. Braun SE: Key Developments
Table 51 Bayer AG: Overview
Table 52 Bayer AG: Product Portfolio
Table 53 Bayer AG: Key Developments
Table 54 AstraZeneca: Overview
Table 55 AstraZeneca: Product Portfolio
Table 56 AstraZeneca: Key Developments
Table 57 Novartis AG: Overview
Table 58 Novartis AG: Product Portfolio
Table 59 Novartis AG: Key Developments

List Of Figures

LIST OF FIGURES

- Figure 1 Global Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)
- Figure 2 Global Infectious Diseases Treatment Market Share, By Infection Type, 2024 & 2033 (%)
- Figure 3 Global Infectious Diseases Treatment Market Share, By Drug Class, 2024 & 2033 (%)
- Figure 4 Global Infectious Diseases Treatment Market Share, By Distribution Channel, 2024 & 2033 (%)
- Figure 5 Global Infectious Diseases Treatment Market Share, By Region, 2024 & 2033 (%)
- Figure 6 Global Infectious Diseases Treatment Market Y-o-Y Growth, By Infection Type, 2023-2033 (%)
- Figure 7 Viral Infections Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)
- Figure 8 Bacterial Infections Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)
- Figure 9 Fungal Infections Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)
- Figure 10 Parasitic Infections Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)
- Figure 11 Global Infectious Diseases Treatment Market Y-o-Y Growth, By Drug Class, 2023-2033 (%)
- Figure 12 Antibacterials Drug Class in Global Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)
- Figure 13 Antivirals Drug Class in Global Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)
- Figure 14 Antifungals Drug Class in Global Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)
- Figure 15 Antiparasitic Drugs Drug Class in Global Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)
- Figure 16 Others Drug Class in Global Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)
- Figure 17 Global Infectious Diseases Treatment Market Y-o-Y Growth, By Distribution Channel, 2023-2033 (%)
- Figure 18 Hospital Pharmacies Distribution Channel in Global Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)

Figure 19 Retail Pharmacies Distribution Channel in Global Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)

Figure 20 Online Pharmacies Distribution Channel in Global Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)

Figure 21 Global Infectious Diseases Treatment Market Y-o-Y Growth, By Region, 2023-2033 (%)

Figure 22 North America Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)

Figure 23 North America Infectious Diseases Treatment Market Share, By Infection Type, 2024 & 2033 (%)

Figure 24 North America Infectious Diseases Treatment Market Share, By Drug Class, 2024 & 2033 (%)

Figure 25 North America Infectious Diseases Treatment Market Share, By Distribution Channel, 2024 & 2033 (%)

Figure 26 North America Infectious Diseases Treatment Market Share, By Country, 2024 & 2033 (%)

Figure 27 Europe Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)

Figure 28 Europe Infectious Diseases Treatment Market Share, By Infection Type, 2024 & 2033 (%)

Figure 29 Europe Infectious Diseases Treatment Market Share, By Drug Class, 2024 & 2033 (%)

Figure 30 Europe Infectious Diseases Treatment Market Share, By Distribution Channel, 2024 & 2033 (%)

Figure 31 Europe Infectious Diseases Treatment Market Share, By Country, 2024 & 2033 (%)

Figure 32 Asia-Pacific Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)

Figure 33 Asia-Pacific Infectious Diseases Treatment Market Share, By Infection Type, 2024 & 2033 (%)

Figure 34 Asia-Pacific Infectious Diseases Treatment Market Share, By Drug Class, 2024 & 2033 (%)

Figure 35 Asia-Pacific Infectious Diseases Treatment Market Share, By Distribution Channel, 2024 & 2033 (%)

Figure 36 Asia-Pacific Infectious Diseases Treatment Market Share, By Country, 2024 & 2033 (%)

Figure 37 South America Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)

Figure 38 South America Infectious Diseases Treatment Market Share, By Infection Type, 2024 & 2033 (%)

Figure 39 South America Infectious Diseases Treatment Market Share, By Drug Class, 2024 & 2033 (%)

Figure 40 South America Infectious Diseases Treatment Market Share, By Distribution Channel, 2024 & 2033 (%)

Figure 41 South America Infectious Diseases Treatment Market Share, By Country, 2024 & 2033 (%)

Figure 42 Middle East and Africa Infectious Diseases Treatment Market Value, 2022-2033 (US\$ Billion)

Figure 43 Middle East and Africa Infectious Diseases Treatment Market Share, By Infection Type, 2024 & 2033 (%)

Figure 44 Middle East and Africa Infectious Diseases Treatment Market Share, By Drug Class, 2024 & 2033 (%)

Figure 45 Middle East and Africa Infectious Diseases Treatment Market Share, By Distribution Channel, 2024 & 2033 (%)

Figure 46 Pfizer Inc.: Financials

Figure 47 AbbVie: Financials

Figure 48 Gilead Sciences, Inc.: Financials

Figure 49 Merck & Co., Inc.: Financials

Figure 50 Sandoz Group AG: Financials

Figure 51 B. Braun SE: Financials

Figure 52 Bayer AG: Financials

Figure 53 AstraZeneca: Financials

Figure 54 Novartis AG: Financials

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