

Global Irritable Bowel Syndrome Treatment Market - 2025-2033

<https://marketpublishers.com/r/GBF5467DE7FEEN.html>

Date: May 2025

Pages: 180

Price: US\$ 4,350.00 (Single User License)

ID: GBF5467DE7FEEN

Abstracts

Global Irritable Bowel Syndrome Treatment Market Overview

The global irritable bowel syndrome treatment market reached US\$ 3.61 billion in 2024 and is expected to reach US\$ 7.68 billion by 2033, growing at a CAGR of 8.8% during the forecast period 2025-2033.

Irritable bowel syndrome (IBS) is a condition with high unmet needs. Globally, 5% to 10% of the population suffers from this condition. The market for IBS is experiencing significant growth driven by factors such as rising prevalence due to increasing stress levels, unhealthy eating habits, sedentary lifestyles, and an aging population. However, lack of awareness, underdiagnosis in low-income and emerging countries, and lack of disease-modifying therapies can significantly hamper the market growth. The new treatment modalities, such as microbiome-based therapies, can provide new avenues of treatment in the future.

Global Irritable Bowel Syndrome Treatment Market Dynamics: Drivers & Restraints

The rising prevalence of irritable bowel syndrome is driving the market growth

Several epidemiological studies were conducted globally to define the population cohorts living with the condition. However, based on the diagnostic criteria employed (Rome III or Rome IV), the prevalence may vary substantially from study to study. However, according to the International Foundation for Gastrointestinal Disorders (IFFGD), irritable bowel syndrome affects approximately 5% to 10% of the world's population, making it one of the most common gastrointestinal disorders. According to its survey results, the majority of the population diagnosed are women, rather than men.

Irritable bowel syndrome is a condition exacerbated by various causes. It can be triggered by changes in lifestyle, excessive stress, consumption of processed foods, mental health conditions, experiencing traumatic events, etc. Anything that disrupts the brain-gut axis can exacerbate IBS. For instance, an epidemiological study conducted in Saudi Arabia, and published in the Springer Nature journal in July 2024, has stated that the key risk factors include anxiety, stress, family history, depression, gastroesophageal disease, etc.

Globally, all population groups, especially adults, are experiencing stress and mental health issues, which are one of the key contributing factors for IBS. A study published in the BMC Public Health journal in December 2024 stated that among 77 evaluated countries, approximately 30 to 50% of the population reported experiencing psychological stress. Among these countries, 85% have reported worsening of the psychological stress levels over the past decade. This indicates that a significant portion of the global population is struggling with some form of mental health issues.

This signifies the proportion of the population who are at risk of IBS. As the global population ages, with significant changes in lifestyle, food habits, and stress levels, the IBS prevalence is expected to rise substantially, propelling the demand for advanced therapeutics in the forecast period.

Underdiagnosis of irritable bowel syndrome may hamper the market growth

Despite the high prevalence of IBS, the diagnosis rate is substantially low, especially in low and middle-income countries. Lack of awareness, misconception of IBS symptoms with other common gastrointestinal conditions, lack of proper biomarkers, and a limited number of diagnostic tests are all factors that contribute to the underdiagnosis of the condition.

A study published in the Neurogastroenterology & Motility journal in November 2024 stated that among the surveyed primary healthcare physicians in the US and Europe, 80% of them have the perception that 80% of the IBS patients are underdiagnosed in a primary healthcare setting. This underdiagnosis can significantly restrain the market growth by limiting the number of patients who receive appropriate treatment.

Global Irritable Bowel Syndrome Treatment Market Segment Analysis

The global irritable bowel syndrome treatment market is segmented based on disease

type, drug class, and region.

Secretagogues in the drug class segment accounted for 32.9% of the market share in 2024 in the global irritable bowel syndrome treatment market

Secretagogues are a class of products that act by stimulating the release of bodily substances like hormones, fluids, enzymes, etc. In irritable bowel syndrome, the secretagogues act by inducing the release of intestinal fluids, which will aid in improving the bowel movement and reducing constipation. These drugs are currently approved by the regulatory bodies, such as the FDA, for use in IBS patients. These include drugs such as linaclotide (Linzess/Constella), lubiprostone (Amitiza), and plecanatide (Trulance). These drugs combinedly generated approximately 1.2 billion sales in 2024.

Due to the presence of brand exclusivity, manufacturers hold greater power in deciding the product price, hence generating higher revenues for their products. Although not widely adopted across the world, and majority of the patient population prefers the generic medication, especially in low & middle-income countries, this segment is poised to grow due to increasing awareness, clinical efficacy, and expansion into growing markets.

Global Irritable Bowel Syndrome Treatment Market Geographical Analysis

North America dominated the irritable bowel syndrome treatment market with the highest share of 45.3% in 2024

The disease burden of IBS is high in North America, especially in the U.S., due to an aging population, increasing stress levels among the population, unhealthy eating habits, mental health conditions, and many other factors. According to the American College of Gastroenterology, 1 in every 20 people in the US suffers from IBS.

In addition to this high disease burden, the U.S. boasts its advanced healthcare industry. There are several advanced drugs available in the U.S. market that are approved specifically for the condition. Manufacturers are constantly involved in launching novel therapies for IBS in the country. For instance, in April 2022, Ardelyx, Inc. announced the U.S. launch of IBSRELA for the treatment of IBS-C in adults. This drug acts by inhibiting NHE3 (Sodium-Hydrogen Exchanger 3), a novel mechanism targeting to treat constipation in IBS patients. This drug has become the first to be approved in the U.S. after 10 years, that is focusing on a novel mechanism.

Moreover, the most popular drugs for IBS, i.e., secretagogues, are widely available in the United States, and in fact, they generate a major portion of their revenue from the country. For instance, linaclotide sold under the brand name Linzess, by Ironwood Pharmaceuticals, Inc. and AbbVie, has generated a total sales of 954 million in 2024, out of which 96% is from the United States. This represents the highest for advanced therapies in the United States. All these factors strongly contribute to the region's dominance in the global irritable bowel syndrome treatment market.

Global Irritable Bowel Syndrome Treatment Market Competitive Landscape (Major Players)

The major players in the irritable bowel syndrome treatment market are Procter & Gamble, Haleon Group of Companies., Teva Pharmaceutical Industries Ltd., Ironwood Pharmaceuticals, Inc., AbbVie., Salix Pharmaceuticals, Foundation Consumer Brands., Kenvue Brands LLC., Pfizer Inc., Upsher-Smith Laboratories, LLC., Sanofi, Bayer AG, Atlantis Consumer Healthcare Inc., Alfasigma Group, Takeda Pharmaceutical Company Limited., and Ardelyx. among others.

Global Irritable Bowel Syndrome Treatment Market Key Development

In May 2024, Ardelyx, Inc. produced additional data supporting the clinical benefits of IBSRELA (tenapanor), a first-in-class drug approved for the treatment of irritable bowel syndrome with constipation (IBS-C) in adults. The data was presented at the 2024 Digestive Disease Week Conference (DDW), held in Washington.

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