

Catheter-Related Bloodstream Infections (CRBSIs)- Market Insights, Epidemiology, and Market Forecast-2028

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Abstracts

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DelveInsight's Catheter-Related Bloodstream Infections (CRBSIs)- Market Insights, Epidemiology, and Market Forecast-2028 report delivers an in-depth understanding of the disease, historical & forecasted epidemiology as well as the market trends of CRBSI in the United States, EU5 (Germany, France, Italy, Spain, and the United Kingdom), and Japan. The Report provides the current treatment practices, emerging drugs, market share of the individual therapies, the current and forecasted market size of CRBSI from 2017 to 2028 segmented by the seven major markets.

CRBSI refers to bloodstream infection attributed to an intravascular catheter by quantitative culture of the catheter tip or by differences in growth between catheter and peripheral venipuncture blood culture specimens. It is also known as catheter-related sepsis.

In the current scenario, there is no US Food and Drug Administration (FDA) approved drugs/lock solution present in the market, specifically for this indication, and therefore, the availability of new therapies will be the major market driver for the therapeutic market of CRBSI. Only one emerging therapy is present, which is in pipeline, i.e. Mino-Lok Therapy by Citius Pharmaceuticals. Due to non-competitiveness and poor pipeline, the launch of Mino-lok in the US or EU will create a huge hype and will have the only candidate in the CRBSI therapeutic landscape. The treatment of CRBSI is mainly preventive and is done by using off-label antibiotics. So, the need for a potential drug candidate is necessary and urgent.

Geography Covered

The United States

EU5 (Germany, France, Italy, Spain, and the United Kingdom)

Japan

Study Period: 2017–2028

Catheter-Related Bloodstream Infections (CRBSIs) - Disease Understanding and Treatment Algorithm

According to “Infectious Diseases Society of America” CRBSI can be defined as bacteremia or fungemia in a patient who has an intravascular device and 11 positive blood culture result obtained from the peripheral vein, clinical manifestations of infection (e.g., fever, chills, and/or hypotension), and no apparent source for bloodstream infection (with the exception of the catheter). One of the following should be present: a positive result of semi-quantitative (>15 cfu per catheter segment) or quantitative ($>10^2$ cfu per catheter segment) catheter culture, whereby the same organism (species) is isolated from a catheter segment and a peripheral blood culture; simultaneous quantitative cultures of blood with a ratio of $>3:1$ cfu/mL of blood (catheter vs. peripheral blood); differential time to positivity (growth in a culture of blood obtained through a catheter hub is detected by an automated blood culture system at least 2 h earlier than a culture of simultaneously drawn peripheral blood of equal volume).

This infection is very common in ICU and non-ICU patients. Currently, there are many off label antimicrobial therapies that are recommended to treat the CRBSI. Besides considering antibiotic coverage, treatment of CRBSI consists of catheter management, with options that include removal, exchange, or salvage of the catheter. Although, salvage therapy with Intravenous antibiotics and antibiotic lock therapy (ALT) can be considered for long-term catheters, including tunneled hemodialysis catheters, in patients with limited vascular access and uncomplicated CRBSI.

Catheter-Related Bloodstream Infections (CRBSIs) – Epidemiology

The CRBSI epidemiology division provides insights about historical and current patient pool and forecasted trends for every 7 major countries. It helps to recognize the causes

of current and forecasted trends by exploring numerous studies and views of key opinion leaders (KOL).

The disease epidemiology covered in the report provides historical as well as forecasted epidemiology [segmented by Total Incident Population of CRBSI in the 7MM, Total Diagnosed Incident Population of CRBSI in the 7MM, and Diagnosed Incidence of CRBSI by Causative Pathogens in the 7MM] scenario of CRBSI in the 7MM covering United States, EU5 countries (Germany, France, Italy, Spain, and United Kingdom) and Japan from 2017–2028.

As per DelveInsight's analysis, total Incident Population of Catheter-Related Bloodstream Infection (CRBSI in the 7MM was found to be 667,753 in 2017 and expected to increase during the forecast period of 2017-2028. The estimates show the incidence was higher in the United States and among the European 5 countries, Germany had the highest incident population of CRBSI followed by France and United Kingdom. On the other hand, Spain had the lowest incident population of CRBSI.

Another estimate of Delveinsight's analysis shows that most of the incident cases of CRBSI are confirmed with specific bacterial species. The estimates show that Gram-positive bacteria are implicated in the majority of the cases of CRBSI in comparison with Gram-negative bacteria.

Catheter-Related Bloodstream Infections (CRBSIs) – Drug Chapters

This segment of the CRBSIs report encloses the detailed analysis of marketed drugs and late stage (Phase-III and Phase-II) pipeline drugs. It also helps to understand the clinical trial details, expressive pharmacological action, agreements and collaborations, approval and patent details, advantages and disadvantages of each included drug and the latest news and press releases.

Neutrolin (CRMD003), is a non-antibiotic, anti-infective developed by Cormedix as a preventative solution to decrease the threat of infection and blood clots (thrombosis), thereby keeping central venous catheters (CVCs) operating safely and efficiently. It is a catheter lock solution for the prevention of catheter-related bloodstream infections (CRBSI) and maintenance of catheter patency in hemodialysis patients. It includes an anti-coagulant and broad-spectrum antimicrobial (antibacterial and antifungal) combination that is active against common microbes, including antibiotic-resistant strains, and in addition, inhibits the formation of biofilm.

TauroSept is an antimicrobial solution (lock solution) developed by Geistlich Pharma for the prevention and treatment of catheter-related infections and is intended for instillation in intravenous catheters between treatments. It mainly contains antibacterial chemotherapeutic agent taurolidine. It possesses a broader antibacterial and antimycotic spectrum of activity than any other conventional antimicrobial agents that are currently available in the market. It is also effective against methicillin-resistant and vancomycin-resistant bacteria (MRSA and VRE).

Another marketed lock solution, TauroLock was developed by TauroPharm for instillation in all central venous access systems. TauroLock catheter lock solution does not contain antibiotics and was developed for prophylactic use only. They decrease catheter-related infections significantly. It is the solution of antimicrobial and anticoagulant.

Fresenius Medical Care developed Intralock, it is also a Catheter lock solution with 4% citrate concentration, 5mL. This lock solution provides efficient coagulation prophylaxis and also minimizes the risk of systemic hypocalcemia and their consequences (cardiac arrhythmia, cardiac arrest).

Only one drug is there that is in the pipeline, which is going to be launched during the forecast period (2019–2028) i.e. Mino-lok developed by Citius Pharmaceuticals. It is an antibiotic lock solution being developed to treat patients with CLABSIs/CRBSIs. It is a combination of minocycline, edetate (disodium EDTA), and ethyl alcohol, all of which act synergistically to break down bacterial biofilms, eradicate the bacteria, provide anti-clotting properties to maintain patency in CVCs, and salvage the indwelling catheter.

Catheter-related Bloodstream Infections (CRBSIs) Market Outlook

The CRBSIs market outlook of the report helps to build the detailed comprehension of the historic, current and forecasted trends of the market by analyzing the impact of current therapies on the market, unmet needs, drivers and barriers and demand of better technology.

The current therapeutic market of CRBSI is dependent on prevention rather than treatment and growth of market size for CRBSI is attributed to currently prescribed treatment regimens as well as emerging therapies. But due to lack of emerging therapies the market of CRBSI is depend on only one emerging therapy.

According to Delveinsight the market size of CRBSI was USD 694.7 million in 2017. The

current therapeutic market of CRBSI in 7MM is driven by supportive (off-label) therapies. Among the 7MM countries, the United States accounted for highest market size for CRBSI of the total 7MM market. Among the EU-5 countries, Germany contributed the highest share towards the treatment market of CRBSI, followed by France.

Another modest increase in market size of currently prescribed therapies has been witnessed from 2017 until the launch of one and only emerging therapy for the treatment of CRBSI in respective countries, while the market share is expected to decline post that for current therapies, owing to the increasing demand for targeted therapies to treat CRBSI.

Catheter-related Bloodstream Infections (CRBSIs)– Drugs Uptake

This section focusses on the rate of uptake of the potential drugs recently launched in the market or will get launched in the market during the study period from 2017-2028. The analysis covers market uptake by drugs; patient uptake by therapies and sales of each drug.

To meet the unmet need of the market and to provide better versions of current treatment practices, the only therapy in late-stage of development being developing by Citius Pharmaceuticals (Mino-lok) for patients with CRBSI, has been anticipated to launch during our forecast period [2019–2028].

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Key Benefits

This DelveInsight report will help to develop Business Strategies by understanding the trends shaping and driving Catheter-related Bloodstream Infections (CRBSIs) market

Organize sales and marketing efforts by identifying the best opportunities for CRBSI market

To understand the future market competition in the CRBSI market.

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