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Myelodysplastic Syndrome (MDS) Drugs Market Size, Share & Trends Analysis By Therapeutic Class (Hypomethylating Agents, Immunomodulatory Drugs, Anti-anemics), And Segment Forecasts, 2016 - 2022

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Abstracts

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The global myelodysplastic syndrome (MDS) drugs market size is expected to reach USD 2.4 billion by 2022, according to a new report by Grand View Research, Inc., exhibiting a 9.7% CAGR during the forecast period. Factors such as strong product pipeline, rising geriatric population, and favorable government initiatives are driving the market.

MDS is caused by mutation of one or more genes that control development of blood cells. Patients with this condition may present with clinical manifestations such as thrombocytopenia, neutropenia, and anemia. Although majority of cases (over 90%) are reported in people over the age of 60, the condition can occur at any age, more frequently in men than in women. About 30% of MDS cases advance to acute myeloid leukemia (AML).

The immunomodulatory drug segment is expected to retain its dominant position in the MDS drugs market due to strong sales of Revlimid. Supported by potential approvals of luspatercept and Aranesp, the anti-anemics drug segment is forecast to gain higher market share than hypomethylating agents, thus contributing significantly to the overall expansion of the market.

Developing novel drugs for the treatment of rare subsets of MDS patients is a key challenge as the disease is highly heterogeneous at the molecular level. In addition,

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morbidity issues and poor quality of life due to incapacitating effects of the standard of care treatment paradigms are causes of inconvenience for geriatric population.

Further key findings from the report suggest:

An estimated 60,000 people in U.S. are living with myelodysplastic syndrome, with approximately 10,000-15,000 new cases being reported annually

U.S. dominated the global MDS drugs market with more than 48.0% share in 2016 owing to rising disease incidence and launch of strong pipeline candidates

Emerging markets such as India, China, and South Korea are expected to exhibit lucrative growth during the forecast period due to favorable government policies, rising awareness about hematological malignancies, increased investment, and improved healthcare infrastructure

Immunomodulatory drugs led the drug classes with a market share of more than 54.0% in 2016. Hypomethylating agents are projected to witness a double-digit decline in market share due to expected patent expirations

Celgene, Amgen, Otsuka, and Takeda are some of the key players operating in this area; Celgene accounted for 95.2% of the market in 2016, driven by strong sales of Revlimid and Vidaza

Currently, there are about 45 pipeline drugs in various stages of clinical development. Promising pipeline candidates such as Aranesp, luspatercept, Vyxeos, guadecitabine, and pevonedistat are expected to generate significant revenue upon launch.

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