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Non-Alcoholic Steatohepatitis Treatment Market Size, Share & Trends Analysis Report By Drug Type (Obeticholic Acid, Lanifibranor, Semaglutide, Resmetirom, Aramchol, Cenicriviroc), By End-use, By Region, And Segment Forecasts, 2022 - 2030

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Abstracts

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Non-Alcoholic Steatohepatitis Treatment Market Growth & Trends

The global non-alcoholic steatohepatitis treatment market size is expected to reach USD 15.95 billion by 2030, according to a new report by Grand View Research, Inc. The industry is projected to expand at a CAGR of 39.2% from 2022 to 2030. The non-alcoholic steatohepatitis (NASH) treatment market is primarily driven by the launch of drugs such as Novo Nordisk's Ozempic, Intercept's Ocaliva, and Inventiva's lanifibranor, among others.

The NASH treatment market has major unmet needs owing to factors such as the unavailability of approved drugs, high disease burden, and complex diagnostic procedures. Currently, the market is dominated by off-label drugs such as Pioglitazone and Vitamin E. These are widely prescribed drugs in this space globally. However, to address the unmet opportunity, key market players are heavily investing in R&D activities to develop novel therapeutics for NASH treatment. Currently, there are more than 50 pipeline candidates.

Some of the late-stage pipeline candidates expected to launch during the forecast period include Inventiva Pharma's Lanifibranor, Intercept Pharmaceuticals' Obeticholic acid, Galmed Pharmaceuticals Ltd.'s Aramchol, Novo Nordisk A/S's Semaglutide, and

Madrigal Pharmaceuticals, Inc.'s Resmetirom. Among these, Intercept Pharmaceuticals's Obeticholic Acid (OCA), and Madrigal Pharmaceuticals, Inc.'s Resmetirom, are the most looked upon drugs and are expected to enter comparatively earlier than other pipeline candidates.

Research studies reveal that non-alcoholic steatohepatitis is strongly associated with obesity and diabetes. Research studies show that around 80% of NASH patients are obese. In countries such as the U.S., the obesity prevalence is as high as 42%, according to the latest 2021 statistics by CDC. In addition, countries such as the U.S. and Japan account for the highest prevalence of non-alcoholic steatohepatitis globally, and these countries also have a high burden of obesity and diabetes. All such factors will fuel the NASH treatment market throughout the forecast period.

Strategic initiatives by pharma giants and supportive regulatory authority policies such as fast track designation are further expected to accelerate the market growth. In May 2022, Pfizer, Inc.'s Ervogastat/Clesacostat Combination therapy received fast track designation. This is one of the potential drug combinations for the treatment of non-alcoholic steatohepatitis. Such drug designation boosts the clinical trial process for drugs.

Liver biopsy is the gold standard for the diagnosis of non-alcoholic steatohepatitis. The invasive nature of this diagnostics test limits its usage to only symptomatic cases, and as a result, the global average diagnostic rate for NASH is around 20%. The unavailability of biomarkers-based non-invasive tests for the diagnosis of non-alcoholic steatohepatitis is expected to impede the market growth.

Non-Alcoholic Steatohepatitis Treatment Market Report Highlights

Vitamin E and Pioglitazone (Off-label) acted as the lone contributor with 100% share to the market in 2021. This can be attributed to the unavailability of approved drugs in the market

The retail and specialty pharmacies segment held a share of 63.8% in 2021. Retail and specialty pharmacies are more compatible with chronic diseases such as NASH, where the patients are more commonly associated with homecare settings

North America dominated the overall NASH treatment space in terms of revenue. This can be attributed to increased disease awareness, better healthcare facilities, and comparatively higher treatment rate than in other regions

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Contents

CHAPTER 1 METHODOLOGY AND SCOPE

CHAPTER 2 EXECUTIVE SUMMARY

CHAPTER 3 NON-ALCOHOLIC STEATOHEPATITIS TREATMENT MARKET VARIABLES, TRENDS, AND SCOPE

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SEGMENT ANALYSIS, BY REGION, 2018 - 2030 (USD MILLION)

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List Of Tables

LIST OF TABLES

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List Of Figures

LIST OF FIGURES

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