

Anti-Rheumatics Market Report by Type (Prescription-based Drugs, Over-the-Counter Drugs), Drug Class (Disease Modifying Anti-Rheumatics Drugs (DMARD's), Nonsteroidal Anti-Inflammatory Drugs (NSAID's), Corticosteroids, Uric Acid Drugs, and Others), Drug Administration (Oral, Parenteral, and Others), Distribution Channel (Hospital Pharmacies, Retail Pharmacies, E-Commerce), and Region 2023-2028

<https://marketpublishers.com/r/A7E065D2ECBFEN.html>

Date: November 2023

Pages: 148

Price: US\$ 2,499.00 (Single User License)

ID: A7E065D2ECBFEN

Abstracts

The global anti-rheumatics market size reached US\$ 62.8 Billion in 2022. Looking forward, IMARC Group expects the market to reach US\$ 73.9 Billion by 2028, exhibiting a growth rate (CAGR) of 2.75% during 2022-2028. The increasing aging population across the globe, expansion of hospitals, clinics, and other healthcare facilities, and the expanding partnerships between large pharmaceutical companies and healthcare centers are some of the major factors propelling the market growth.

Anti-rheumatics are medications used to treat diseases affecting the joints, muscles, and connective tissues. They help reduce inflammation, pain, and stiffness, and slow the progression of the disease. They are available in various classes, including non-steroidal anti-inflammatory drugs (NSAIDs), disease-modifying anti-rheumatic drugs (DMARDs), and biologics. They can be administered orally, subcutaneously and intravenously into the body. They target the underlying mechanisms that lead to tissue damage and inflammation. They are generally prescribed after a thorough diagnosis and are used in combination for optimum results.

The rising prevalence of rheumatic diseases due to unhealthy dietary patterns and lack of physical activity represent one of the key factors catalyzing the demand for effective treatments. Additionally, continuous development in drug delivery systems, like nanoparticle-based carriers or time-release capsules, is enhancing the efficacy and convenience of anti-rheumatic medications. Apart from this, the growth of telehealth services is enabling better disease management and easier prescription refills, promoting consistent use of anti-rheumatic drugs. Furthermore, the expansion of healthcare systems into emerging markets is making anti-rheumatic medications more accessible to underserved populations. Moreover, advancements in genomics and personalized medicine are allowing for more targeted treatments and improving the effectiveness of anti-rheumatic medications.

Anti-Rheumatics Market Trends/Drivers:

Rising aging population

The increasing aging population, which is more susceptible to joint disorders, such as osteoarthritis and rheumatoid arthritis, represents one of the key factors augmenting the market growth. Moreover, older populations often have multiple health conditions that can exacerbate rheumatic diseases, thus requiring more complex and long-term treatment strategies. Additionally, governing authorities and healthcare systems of various countries are recognizing this growing need and are increasing healthcare budgets to address the challenges of an aging society. Pharmaceutical companies are also focusing their research and development efforts on creating more effective and safer anti-rheumatic medications. As a result, the market for these drugs is expected to grow substantially in the coming years.

Strategic collaborations and mergers

The increasing number of strategic collaborations, mergers, and acquisitions (M&A) among pharmaceutical companies and healthcare facilities is another major factor contributing to the market growth. They often include knowledge-sharing agreements, making it easier to navigate regulatory hurdles and reducing the time-to-market for new medications. Additionally, the expanding partnerships between large pharmaceutical companies and biotech startups result in the faster development and commercialization of new anti-rheumatic drugs. Apart from this, it facilitates research and development (R&D) activities to introduce more advanced drugs. Furthermore, these collaborations promote an easy supply of anti-rheumatic drugs to reach previously untapped markets, contributing to global market growth.

Rising awareness about early diagnosis and prevention

The rising awareness among individuals about the benefits of early diagnosis and prevention of rheumatoid diseases is strengthening the growth of the market. Early diagnosis allows for more effective management of the disease, often requiring the use of anti-rheumatic drugs. Additionally, the increasing reliance of people on social media channels promoting medical education is positively influencing the market. Furthermore, the governing authorities of several countries are organizing public health campaigns, which is offering a favorable market outlook. Moreover, the development of advanced diagnostic tools has made it easier for healthcare professionals to identify rheumatic diseases at an early stage. This proactive approach enhances the market demand for anti-rheumatics, as timely intervention necessitates medication for symptom management and disease modification.

Anti-Rheumatics Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market report, along with forecasts at the global regional, and country levels from 2023-2028. Our report has categorized the market based on type, drug class, route of drug administration and, distribution channel.

Breakup by Type:

Prescription-based Drugs
Over-the-Counter Drugs

Prescription-based drugs account for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the type. This includes prescription-based drugs and over-the-counter drugs. According to the report, prescription-based drugs represented the largest segment as they are usually more potent and targeted compared to over the counter (OTC) options. Additionally, prescription-based medications are generally more likely to be covered by insurance plans, making them financially accessible for a larger patient population. The ease of insurance claims for prescription drugs further promotes their usage and contributes to their larger market share. Apart from this, they come with the advantage of regular healthcare provider reviews, allowing for ongoing adjustments to the treatment regimen based on the course of the diseases and patient response. Furthermore, the latest innovations in anti-rheumatic treatments are often patented prescription medications. Pharmaceutical companies invest significantly in R&D to

develop novel prescription drugs, ensuring that the most advanced treatment options are primarily available in prescription form.

Breakup by Drug Class:

Disease Modifying Anti-Rheumatics Drugs (DMARD's)

Nonsteroidal Anti-Inflammatory Drugs (NSAID's)

Corticosteroids

Uric Acid Drugs

Others

Disease modifying anti-rheumatics drugs (DMARD's) hold the largest share in the industry

A detailed breakup and analysis of the market based on the drug class has also been provided in the report. This includes disease modifying anti-rheumatics drugs (DMARD's), nonsteroidal anti-inflammatory drugs (NSAID's), corticosteroids, uric acid drugs, and others. According to the report, disease modifying anti-rheumatics drugs (DMARD's) accounted for the largest market share as they work at a cellular level to modulate the immune response and aid in effectively altering the course of rheumatic diseases. Additionally, they help reduce the frequency of hospital visits, surgeries, and other expensive medical interventions. Apart from this, in many healthcare systems, DMARDs are included in insurance coverage plans, making them financially accessible to a larger population. Effective reimbursement policies further encourage the prescription of DMARDs, thus enhancing their market share. Moreover, continuous advancements in personalized medicine are leading to the development of more targeted DMARD therapies, enhancing their efficacy and reducing potential side effects, thereby reinforcing their market dominance.

Breakup by Route of Drug Administration:

Oral

Parenteral

Others

Parenteral represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the route of drug administration. This includes oral, parenteral, and others. According to the

report, parenteral represented the largest segment as it allows for the direct delivery of drug into the bloodstream or target tissue, bypassing the gastrointestinal system. This results in a quicker onset of action and often increased efficacy compared to oral medications, which is a crucial factor in treating acute flare-ups or severe cases of rheumatic diseases. Apart from this, physicians often prefer parenteral administration for its rapid action, especially in hospital settings where immediate symptom relief or disease control is required. Moreover, parenteral medications undergo stringent quality control measures to ensure sterility and potency, which adds another layer of assurance for both healthcare providers and patients. Furthermore, many parenteral formulations are available in pre-filled syringes or auto-injectors, making it easier for patients to self-administer their medication, thereby enhancing adherence to treatment plans.

Breakup by Distribution Channel:

Hospital Pharmacies

Retail Pharmacies

E-Commerce

Hospital pharmacies exhibit a clear dominance in the market

A detailed breakup and analysis of the market based on the distribution channel has also been provided in the report. This includes hospital pharmacies, retail pharmacies, and e-commerce. According to the report, hospital pharmacies hold the majority of the market share as they are generally situated in close proximity to consultation rooms, diagnostic services, and treatment areas. This centralization allows for the immediate dispensing of anti-rheumatic medications following a diagnosis or prescription revision, providing an advantage in terms of convenience and speed over retail or online pharmacies. Additionally, pharmacists in hospital settings often have specialized training and experience in managing chronic diseases, including rheumatic conditions. They work in close collaboration with healthcare teams, including rheumatologists and nurses, ensuring that patients receive the most appropriate medication for their condition. Apart from this, they operate round-the-clock, ensuring that medications are available during emergencies or off-hours.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America leads the market, accounting for the largest anti-rheumatics market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share since the region is a hub for pharmaceutical research and development (R&D). Additionally, North America, particularly the United States, has a well-established healthcare system equipped with state-of-the-art medical facilities. This superior infrastructure allows for the early diagnosis and comprehensive treatment of rheumatic diseases, which naturally leads to a higher demand for anti-rheumatic medications. Along with this, the widespread availability of specialized rheumatology clinics and medical professionals further drives the need for these drugs. Apart from this, the regulatory environment in North America, led by agencies like the U.S. Food and Drug Administration (FDA), is highly supportive

of medical advancements. Furthermore, the increasing aging population in the region is driving the demand for anti-rheumatics.

Competitive Landscape:

Companies are investing heavily in the development of new anti-rheumatic drugs, targeting existing and emerging therapeutic mechanisms. Additionally, many companies are entering into partnerships, mergers, and acquisitions. These strategic collaborations often involve sharing technology, resources, and market channels. Apart from this, they are also focusing on expanding market access through various channels. This often involves launching products in new geographical markets, increasing production capacities, or diversifying supply chains to ensure more reliable distribution. Furthermore, various companies are using analytics to identify market trends, patient preferences, and treatment outcomes. Moreover, they are investing in educational programs for healthcare providers, patients, and the public.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

AbbVie Inc.
Amgen Inc.
AstraZeneca plc
Biogen Inc.
Bristol-Myers Squibb Company
Celltrion Inc.
Eli Lilly and Company
F. Hoffmann-La Roche AG
Johnson & Johnsons
Pfizer Inc.
Sanofi SA

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Recent Developments:

In July 2023, AbbVie Inc. announced that the first patient has been dosed in the Phase 3 Step-Up HS study to evaluate upadacitinib (RINVOQ®) in adults and adolescents with moderate to severe hidradenitis suppurativa (HS) symptoms and have failed anti-tumor necrosis factor (TNF) therapy and one approved non-anti-TNF inhibitor therapy for HS.1

In November 2022, Amgen Inc. announced that clinical and real-world data across its broad portfolio of established treatments and pipeline assets will be presented at the annual American College of Rheumatology Convergence (ACR).

In September 2022, Biogen Inc. announced that the European Medicines Agency (EMA) had accepted the Marketing Authorization Application (MAA) for BIIB800, a biosimilar candidate referencing RoACTEMRA®1 (tocilizumab), an anti-interleukin-6 receptor monoclonal antibody.

Key Questions Answered in This Report

1. What was the size of the global anti-rheumatics market in 2022?
2. What is the expected growth rate of the global anti-rheumatics market during 2023-2028?
3. What are the key factors driving the global anti-rheumatics market?
4. What has been the impact of COVID-19 on the global anti-rheumatics market?
5. What is the breakup of the global anti-rheumatics market based on the type?
6. What is the breakup of the global anti-rheumatics market based on the drug class?
7. What is the breakup of the global anti-rheumatics market based on the route of drug administration?
8. What is the breakup of the global anti-rheumatics market based on the distribution channel?
9. What are the key regions in the global anti-rheumatics market?
10. Who are the key players/companies in the global anti-rheumatics market?

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