

Heart Failure Market: Epidemiology, Industry Trends, Share, Size, Growth, Opportunity, and Forecast 2024-2034

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Abstracts

The heart failure market reached a value of US\$ 6.6 Billion across the top 7 markets (US, EU4, UK, and Japan) in 2023. Looking forward, IMARC Group expects the top 7 markets to reach US\$ 18.5 Billion by 2034, exhibiting a growth rate (CAGR) of 9.81% during 2024-2034.

The heart failure market has been comprehensively analyzed in IMARC's new report titled "Heart Failure Market: Epidemiology, Industry Trends, Share, Size, Growth, Opportunity, and Forecast 2024-2034". Heart failure, also referred to as congestive heart failure, is a chronic, progressive condition in which the heart cannot pump enough blood to meet the body's requirements. This can happen due to a variety of factors, such as high blood pressure, damage to the heart muscle, or a previous heart attack. Heart failure is classified into two types: heart failure with reduced ejection fraction (HFrEF) and heart failure with preserved ejection fraction (HFpEF). While HFpEF results from a stiff left ventricle that cannot fill with blood appropriately, HFrEF happens when the heart's left ventricle is unable to pump blood efficiently. Some of the symptoms of heart failure include shortness of breath, swelling in the legs and feet, fatigue, and rapid or irregular heartbeat. An electrocardiogram (ECG), echocardiography, chest x-ray, and blood tests may be performed to identify heart failure. The treatment typically includes a combination of lifestyle changes, such as adopting a heart-healthy diet and engaging in regular exercise, as well as medication to improve the heart's ability to pump blood. In some cases, surgery, including a heart transplant or a procedure to implant a heart pump, may be required.

The expanding geriatric population, who are more susceptible to diabetes and chronic cardiovascular diseases, is primarily driving the global heart failure market. In addition

to this, the increasing prevalence of heart problems among the masses owing to obesity and lack of physical activities is also bolstering the market growth. Moreover, the rising incidences of several associated risk factors, such as excessive smoking and drinking of alcoholic beverages, along with the unhealthy dietary habits of individuals, are propelling the occurrence of heart problems, which is further catalyzing the global market. Apart from this, the emerging popularity of angiotensin-converting-enzyme (ACE) inhibitors, which work by relaxing the blood vessels and allowing the heart to pump blood more easily, is also creating a positive outlook for the market. Additionally, the widespread adoption of diuretics to remove excess fluid from the body, which can help to reduce heart failure symptoms, is further augmenting the global market. Besides this, several key players are making significant investments in introducing new drugs, such as sacubitril/valsartan, to lower the risk of cardiovascular mortality and heart failure in adult patients. This, in turn, is also acting as a significant growth-inducing factor. Furthermore, the increasing utilization of left ventricular assist device (LVAD) as a bridge to transplantation or as a destination therapy for patients who are not candidates for transplantation is expected to drive the global heart failure market in the coming years.

IMARC Group's new report provides an exhaustive analysis of the heart failure market in the United States, EU4 (Germany, Spain, Italy, and France), United Kingdom, and Japan. This includes treatment practices, in-market, and pipeline drugs, share of individual therapies, market performance across the seven major markets, market performance of key companies and their drugs, etc. The report also provides the current and future patient pool across the seven major markets. According to the report, the United States has the largest patient pool for heart failure and also represents the largest market for its treatment. Furthermore, the current treatment practice/algorithm, market drivers, challenges, opportunities, reimbursement scenario, unmet medical needs, etc., have also been provided in the report. This report is a must-read for manufacturers, investors, business strategists, researchers, consultants, and all those who have any kind of stake or are planning to foray into the heart failure market in any manner.

Recent Developments:

In March 2024, Novo Nordisk and Cardior Pharmaceuticals announced that Novo Nordisk agreed to acquire Cardior Pharmaceuticals and strengthen its pipeline in cardiovascular disease. The acquisition includes Cardior's flagship candidate, CDR132L, which is currently in phase 2 clinical evaluation for the therapy of heart failure. CDR132L is intended to prevent and partially restore cellular pathology by selectively suppressing abnormal levels of the microRNA molecule miR-132 to enhance

cardiac function.

In December 2023, BiVACOR secured FDA approval for its Total Artificial Heart (BTAH) IDE first-in-human early feasibility study (EFS). The BTAH device is designed to take over all functions for individuals suffering from heart failure.

In August 2023, Novo Nordisk announced the headline results from the SELECT cardiovascular outcomes trial. The study found that semaglutide, an antidiabetic and weight-reduction medicine, can help individuals with heart failure and obesity lose weight while also relieving symptoms and increasing exercise capacity.

In May 2023, the FDA approved sotagliflozin (Inpefa) from Lexicon Pharmaceuticals, Inc., a once-daily tablet indicated to lower the likelihood of cardiovascular death, heart failure hospitalization, and urgent heart failure visits in adults with cardiovascular disease.

In February 2023, Cytokinetics, Incorporated declared that the U.S. FDA issued a Complete Response Letter (CRL) on the New Drug Application (NDA) for omecamtiv mecarbil, an investigational, potent, small molecule cardiac myosin activator for the management of heart failure with reduced ejection fraction (HFrEF).

Key Highlights:

Heart failure affects more than 65 million people worldwide and is most commonly caused by heart conditions like ischemic heart disease, cardiomyopathy, or high blood pressure.

Heart failure affects around 6.7 million Americans over the age of 20, and the number is anticipated to increase to 8.5 million by 2030.

The lifetime risk of heart failure has risen to 24%; approximately 1 in every 4 individuals will develop heart failure in their lifetime.

The prevalence of heart failure, as examined by systematic echocardiographic screening, is significantly higher, even reaching 11.8% in a meta-analysis.

Heart failure directly causes around 8.5% of all heart disease deaths in the United States.

Drugs:

Atacand (candesartan cilexetil) is a type of angiotensin II receptor blocker (ARB) used to treat heart failure (NYHA class II-IV) in individuals with left ventricular systolic dysfunction (ejection fraction < 40%). It is intended to prevent cardiovascular deaths and hospitalizations. It inhibits the vasoconstrictor and aldosterone-secreting effects of angiotensin II by selectively blocking its binding to the AT1 receptor in various tissues, including vascular smooth muscle and the adrenal gland.

Mitiperstat is under clinical development by AstraZeneca for heart failure with left

ventricular ejection fraction and diastolic heart failure with preserved ejection fraction. It is a small medicinal substance administered orally in the form of a coated tablet, solution, or suspension. This drug candidate works by targeting myeloperoxidase (MPO) in patients.

Omecamtiv mecarbil is a potent small-molecule cardiac myosin activator. This drug is designed to specifically target the contractile process, or pumping activity, of the heart. By activating cardiac myosin, a protein that converts chemical energy into a mechanical force that causes the heart to contract, omecamtiv mecarbil may enhance cardiac muscle performance. Preclinical studies have revealed that cardiac myosin activators boost cardiac contractility without changing the concentrations of intracellular myocyte calcium or myocardial oxygen consumption.

Time Period of the Study

Base Year: 2023

Historical Period: 2018-2023

Market Forecast: 2024-2034

Countries Covered

United States

Germany

France

United Kingdom

Italy

Spain

Japan

Analysis Covered Across Each Country

Historical, current, and future epidemiology scenario

Historical, current, and future performance of the heart failure market

Historical, current, and future performance of various therapeutic categories in the market

Sales of various drugs across the heart failure market

Reimbursement scenario in the market

In-market and pipeline drugs

Competitive Landscape:

This report also provides a detailed analysis of the current heart failure marketed drugs and late-stage pipeline drugs.

In-Market Drugs

Drug overview

Mechanism of Action

Regulatory Status

Clinical Trial Results

Drug Uptake and Market Performance

Late-Stage Pipeline Drugs

Drug Overview

Mechanism of Action

Regulatory Status

Clinical Trial Results

Drug Uptake and Market Performance

*Kindly note that the drugs in the above table only represent a partial list of marketed/pipeline drugs, and the complete list has been provided in the report.

Key Questions Answered in this Report:

Market Insights

How has the heart failure market performed so far and how will it perform in the coming years?

What are the markets shares of various therapeutic segments in 2023 and how are they expected to perform till 2034?

What was the country-wise size of the heart failure market across the seven major markets in 2023 and what will it look like in 2034?

What is the growth rate of the heart failure market across the seven major markets and what will be the expected growth over the next ten years?

What are the key unmet needs in the market?

Epidemiology Insights

- What is the number of prevalent cases (?2018-2034?) of heart failure across the seven major markets?
- What is the number of prevalent cases (?2018-2034?) of heart failure by age across the seven major markets?
- What is the number of prevalent cases (?2018-2034?) of heart failure by gender across the seven major markets?
- What is the number of prevalent cases (?2018-2034?) of heart failure by type across the seven major markets?
- How many patients are diagnosed (?2018-2034?) with heart failure across the seven major markets?
- What is the size of the heart failure patient pool (2018-2023) across the seven major markets?
- What would be the forecasted patient pool (2024-2034) across the seven major markets?
- What are the key factors driving the epidemiological trend of heart failure?
- What will be the growth rate of patients across the seven major markets?

Heart Failure: Current Treatment Scenario, Marketed Drugs and Emerging Therapies

- What are the current marketed drugs and what are their market performance?
- What are the key pipeline drugs and how are they expected to perform in the coming years?
- How safe are the current marketed drugs and what are their efficacies?
- How safe are the late-stage pipeline drugs and what are their efficacies?
- What are the current treatment guidelines for heart failure drugs across the seven major markets?
- Who are the key companies in the market and what are their market shares?
- What are the key mergers and acquisitions, licensing activities, collaborations, etc. related to the heart failure market?
- What are the key regulatory events related to the heart failure market?
- What is the structure of clinical trial landscape by status related to the heart failure market?
- What is the structure of clinical trial landscape by phase related to the heart failure market?
- What is the structure of clinical trial landscape by route of administration related to the heart failure market?

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