

Protein Therapeutics Market: Global Industry Trends, Share, Size, Growth, Opportunity and Forecast 2023-2028

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Abstracts

Market Overview 2023-2028:

The global protein therapeutics market size reached US\$ 322.7 Billion in 2022. Looking forward, IMARC Group expects the market to reach US\$ 487.0 Billion by 2028, exhibiting a growth rate (CAGR) of 7% during 2023-2028. The increasing prevalence of chronic diseases such as cancer, diabetes, cardiovascular diseases, and autoimmune disorders, the rapid technological advancements in protein engineering, the expanding biopharmaceutical industry, and the widespread product applications in diverse therapeutic areas are some factors propelling the market.

Protein therapeutics is a class of medical treatments utilizing proteins or peptides to prevent, manage, or cure diseases. These therapeutics are designed to target specific molecules or pathways within the body, providing a highly targeted approach to treatment. They offer innovative solutions for a wide range of conditions, including cancer, autoimmune disorders, genetic diseases, and more. They can be derived from natural sources or produced through recombinant DNA technology, allowing for the development of highly specific and potent therapies. These therapeutic proteins can take various forms, including monoclonal antibodies, growth factors, enzymes, and cytokines. They interact with specific receptors or molecules in the body, modulating cellular processes, inhibiting or stimulating immune responses, or directly targeting disease-causing agents. The advantages of protein therapeutics lie in their high specificity, potency, and low toxicity. They often offer improved efficacy and fewer side effects than traditional small-molecule drugs. They have significantly advanced the field of medicine, providing novel treatment options and improving patient outcomes across various diseases.

The global market is majorly driven by the increasing focus on personalized medicine. In line with this, the rising research and development activities and the expanding healthcare infrastructure are significantly contributing to the market. Furthermore, the advancements in manufacturing processes are expected to fuel the market. Apart from this, the breakthroughs in genetic engineering, protein synthesis, and production technologies have enhanced the efficiency and effectiveness of protein therapeutics, positively influencing the market. Moreover, the growing prevalence of chronic diseases such as cancer, diabetes, cardiovascular disorders, and autoimmune diseases is catalyzing the market. Besides, the widespread applications of protein therapeutics in oncology are stimulating the market. Additionally, the rapid innovations in drug delivery systems have improved the delivery of protein therapeutics, enhancing their efficacy and patient compliance. Novel delivery methods such as sustained-release formulations, nanoparticles, and targeted drug delivery systems are driving the market growth by increasing the therapeutic potential of protein drugs.

Protein Therapeutics Market Trends/Drivers:

Growing biopharmaceutical research and development investments

Biopharmaceutical companies and research institutions are increasingly focusing on the development of protein-based drugs due to their high specificity, efficacy, and targetability. The rise in R&D investments in the biopharmaceutical sector is fueling advancements in protein therapeutics. These investments support research activities related to protein engineering, drug discovery, and formulation optimization, leading to the development of novel and improved protein therapeutics. Furthermore, the substantial funds allocated to R&D enable researchers to explore new therapeutic targets, optimize protein structures for enhanced activity, and conduct extensive preclinical and clinical trials. These efforts contribute to the expansion of the market by introducing innovative treatments for various diseases. Moreover, the growing R&D investments facilitate the scaling-up of production processes for protein therapeutics, making them more accessible and cost-effective. This enables increased commercialization and market penetration of protein-based drugs.

Expansion of biosimilars

The expansion of the biosimilars market is significantly contributing to the market. Biosimilars are biologic drugs that are highly similar to approved reference protein therapeutics. As patents for several blockbuster biologics expire, the market for

biosimilars is expanding rapidly. The availability of biosimilars provides cost-effective alternatives to expensive protein therapeutics, making them more accessible to patients and healthcare systems. This increased affordability enhances patient access to necessary treatments, driving market growth. Furthermore, the introduction of biosimilars fosters competition in the market. Competition leads to price reductions, encouraging market expansion and creating opportunities for biosimilar manufacturers and reference protein therapeutics companies to innovate and improve their products. Moreover, the regulatory frameworks and guidelines for biosimilars have become more established and streamlined, providing a clear pathway for their development and approval. This has instilled confidence in the healthcare community and resulted in increased biosimilar adoption. As the biosimilars market expands, it stimulates further research and development efforts in protein therapeutics. Manufacturers strive to develop more advanced and differentiated biosimilars, creating a positive outlook for the market.

Rising aging population

The rising aging population is positively influencing the market. As the global population ages, there is a higher prevalence of age-related diseases and conditions such as Alzheimer's disease, Parkinson's disease, macular degeneration, and osteoporosis. Protein therapeutics are being developed and utilized to address these specific health challenges the aging population faces. Furthermore, protein therapeutics offer targeted treatment options for age-related diseases, providing improved efficacy and reduced side effects as compared to traditional therapies. They can target specific molecular pathways and address the underlying mechanisms of these diseases, thereby improving patient outcomes and quality of life. Moreover, the increasing product demand among the aging population is driving market growth. Pharmaceutical companies and research institutions are investing in the development of novel protein therapeutics to meet the specific needs of this demographic. Additionally, the growing aging population creates a larger market for protein therapeutics, prompting manufacturers to expand their product portfolios and increase production. This, in turn, leads to a wider availability of protein therapeutics and further drives market growth.

Protein Therapeutics Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global protein therapeutics market report, along with forecasts at the global, regional and country levels from 2023-2028. Our report has categorized the market based on product, therapy area, and function.

Breakup by Product:

Monoclonal Antibodies (mAbs)

Human Insulin

Erythropoietin

Clotting Factors

Fusion Protein

Others

Monoclonal Antibodies (mAbs) dominates the market

The report has provided a detailed breakup and analysis of the market based on product. This includes monoclonal antibodies (mAbs), human insulin, erythropoietin, clotting factors, fusion protein, and others. According to the report, monoclonal antibodies (mAbs) represented the largest segment.

Monoclonal antibodies (mAbs) are extensively used to treat cancer, autoimmune disorders, and inflammatory diseases. The increasing prevalence of these conditions, coupled with advancements in antibody engineering and production technologies, drives the demand for mAbs and contributes to the market growth.

On the other hand, human insulin is a vital protein therapeutic for managing diabetes. With the rising incidence of diabetes worldwide, the demand for insulin and insulin analogs is increasing, leading to market growth in this segment. Moreover, erythropoietin (EPO) is another important therapeutic protein stimulating red blood cell production. It is used to treat anemia, particularly in patients with chronic kidney disease and cancer undergoing chemotherapy. The expanding patient pool requiring EPO therapy is driving the growth of this segment.

Besides this, the clotting factors are proteins essential for blood clotting. They are used to manage bleeding disorders such as hemophilia. The growing awareness, diagnosis, and treatment of hemophilia fuel the demand for clotting factors and contribute to the market. In addition, fusion proteins, which combine two or more functional protein

domains, have gained significant attention in the development of innovative therapeutics. They offer unique treatment approaches for various diseases, including cancer and autoimmune disorders, thus driving the market in this segment.

Breakup by Therapy Area:

Metabolic Disorders

Immunological Disorders

Hematological Disorders

Cancer

Hormonal Disorders

Genetic Disorders

Others

Metabolic Disorders holds the largest share of the market

A detailed breakup and analysis of the market based on the therapy area have also been provided in the report. This includes metabolic disorders, immunological disorders, hematological disorders, cancer, hormonal disorders, genetic disorders, and others. According to the report, metabolic disorders accounted for the largest market share.

Metabolic disorders encompass conditions such as diabetes, obesity, and hypercholesterolemia. Protein therapeutics, such as insulin for diabetes management, are crucial in treating and controlling these disorders. The rising prevalence of metabolic disorders, coupled with the increasing demand for targeted and effective treatments, is driving the growth of the market in this segment.

On the contrary, immunological disorders, including autoimmune diseases and inflammatory conditions, represent another significant therapy area for protein therapeutics. Monoclonal antibodies and other protein-based drugs modulate the immune system and target specific disease pathways. The growing incidence of immunological disorders and the expanding range of approved protein therapeutics for these conditions are driving the market.

In addition, cancer remains one of the primary drivers of the market. Protein-based therapies, including monoclonal antibodies, antibody-drug conjugates, and immune checkpoint inhibitors, have revolutionized cancer treatment. The increasing incidence of cancer globally, coupled with the development of targeted therapies and immunotherapies, is propelling the growth of the market in oncology.

Breakup by Function:

Enzymatic and Regulatory Activity

Special Targeting Activity

Vaccines

Protein Diagnostics

A detailed breakup and analysis of the market based on the function have also been provided in the report. This includes enzymatic and regulatory activity, special targeting activity, vaccines, and protein diagnostics.

Protein therapeutics with enzymatic and regulatory activity are vital in modulating biological processes and metabolic pathways. These proteins act as enzymes, receptors, or signaling molecules, offering therapeutic benefits in various diseases. The development of novel protein therapeutics with specific enzymatic or regulatory functions drives market growth in this segment.

Furthermore, special targeting activity refers to protein therapeutics targeting certain cells, tissues, or molecular targets. Monoclonal antibodies and antibody-drug conjugates are examples of protein therapeutics with special targeting activity. They can precisely recognize and bind to specific molecules or cells, providing highly targeted therapies. The increasing demand for targeted treatments in conditions such as cancer and autoimmune diseases fuels the growth of protein therapeutics in this segment.

Moreover, vaccines are another significant segment in the market. Protein-based vaccines utilize specific proteins or peptides to stimulate an immune response and confer immunity against infectious diseases. The global focus on vaccination programs, the emergence of new infectious diseases, and the need for improved vaccine technologies drive market growth in this segment.

Besides, protein diagnostics involves using proteins or protein-based assays for diagnostic purposes. These diagnostics can detect specific proteins or biomarkers associated with diseases, aiding in early detection, disease monitoring, and personalized treatment. The growing demand for accurate and reliable diagnostic tools fuels the growth of protein diagnostics and contributes to the overall market.

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 exhibits a clear dominance, accounting for the largest protein therapeutics market share

The 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.

North America, particularly the United States, holds a significant market share. The region benefits from advanced healthcare infrastructure, a strong presence of biopharmaceutical companies, and robust research and development activities. The presence of key players and extensive investments in protein therapeutics research contribute to market growth in North America. Additionally, the high prevalence of chronic diseases, a large aging population, and favorable reimbursement policies further drive the market in the region.

On the other hand, Asia Pacific is emerging as a rapidly growing market. The region has a large population base, increasing healthcare expenditure, and a rising prevalence of chronic diseases. Countries such as China, Japan, and India are witnessing substantial growth in the biopharmaceutical industry and investing in research and development.

Moreover, the increasing awareness of personalized medicine and growing demand for cost-effective treatment options are driving the adoption of protein therapeutics in Asia Pacific.

Competitive Landscape:

Top companies are investing heavily in scientific research to identify new therapeutic targets and develop protein-based drugs with enhanced efficacy and safety profiles. They leverage their protein engineering, molecular biology, and biotechnology expertise to design and optimize therapeutic proteins. Furthermore, these companies establish strategic collaborations with academic institutions, research organizations, and other pharmaceutical companies to access new technologies, expand their pipelines, and accelerate development. Collaborations enable the exchange of knowledge, resources, and expertise, fostering innovation and driving the market. Moreover, successful commercialization strategies play a vital role in driving market growth. These companies employ robust marketing and sales efforts to promote and distribute their products to healthcare providers and patients worldwide. They conduct extensive clinical trials, generate compelling clinical data, and obtain regulatory approvals to ensure market access. Additionally, the top companies continuously invest in manufacturing capabilities and quality control systems to meet the growing demand and ensure a consistent supply of their products. This commitment to manufacturing excellence helps them meet the needs of patients, healthcare providers, and payers, further driving the market growth.

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

Amgen Inc.

Abbott Laboratories

Abbvie Inc.

Baxter International Inc.

Biogen Inc.

Csl Behring L.L.C. (CSL Limited)

Eli Lilly and Company

F. Hoffmann-La Roche AG (Roche Holding AG)

Johnson & Johnson

Merck & Co. Inc.

Novo Nordisk A/S (Novo Holdings A/S)

Pfizer Inc.

Recent Developments:

In 2020, Amgen Inc. entered into a collaboration with Adaptive Biotechnologies to develop and commercialize fully human-neutralizing antibodies targeting SARS-CoV-2, the virus that causes COVID-19.

In 2021, Abbott Laboratories received FDA clearance for their Tendyne Transcatheter Mitral Valve Replacement (TMVR) system, a minimally invasive therapy for patients with severe mitral regurgitation.

In 2020, AbbVie Inc. acquired Allergan, a pharmaceutical company known for its portfolio of aesthetic and therapeutic products, including Botox.

Key Questions Answered in This Report

1. What was the size of the global protein therapeutics market in 2022?
2. What is the expected growth rate of the global protein therapeutics market during 2023-2028?
3. What has been the impact of COVID-19 on the global protein therapeutics market?
4. What are the key factors driving the global protein therapeutics market?
5. What is the breakup of the global protein therapeutics market based on the product?

6. What is the breakup of the global protein therapeutics market based on the therapy area?
7. What are the key regions in the global protein therapeutics market?
8. Who are the key players/companies in the global protein therapeutics market?

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