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Global Microbiome Therapeutics & Diagnostics Market Analysis & Forecast to 2023

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Abstracts

Description

This report provides a comprehensive overview of the size of the microbiome therapeutic and diagnostic market, segmentation of the market (Gastrointestinal, Metabolic, Cancer, Neurological, Autoimmune, Skin), key players and the potential of therapies that are in clinical trials. Kelly Scientific analysis indicates that the global microbiome therapeutic and diagnostic market is worth $1.13 billion in 2018 and will grow at a CAGR of 19.03% over five years to $2.7 billion in 2023. The majority of the market will be dominated by microbiome based therapeutics, with an estimate of x%, compared to x% in microbiome diagnostics. This report describes the evolution of such a prospective market in eight chapters supported by over 82 tables and figures in 165 pages.

An overview of the human microbiome space that includes how the market is sub-divided into therapeutics (prebiotics, probiotics, fecal microbiota transplantation, small molecules) and diagnostics.

Global microbiome market, global breakdown, application breakdown and leading market players

Detailed account of the microbiome industry market by geography, indication and company profiles

Profiles, pipeline products, financial analysis and business strategy of the major companies in this space

Focus on current trends, business environment, pipeline products, clinical trials, and future market forecast for microbiome therapeutics and diagnostics

Insight into the challenges faced by stakeholders

Insight into the biobanking industry globally and its impact on the overall market

Description and data for the prevalence of disease types that are addressed by harnessing the human microbiota

Financial market forecast through 2023 with CAGR values of all market segments outlined in the objective

SWOT analysis of the global market

Geographical analysis and challenges within key topographies including North America, Europe, Asia/Pacific, Middle East/Africa, ROW

Executive Summary

The global microbiome therapeutic and diagnostic market is worth $1.13 billion in 2018 and will grow at a CAGR of 19.03% over five years to $2.7 billion in 2023. The majority of the market will be dominated by microbiome based therapeutics, with an estimate of x%, compared to x% in microbiome diagnostics. Therefore, the global microbiome therapeutics market is worth $x billion in 2018, compared to $x billion in the diagnostic space. By 2023, therapeutics will grow to $x billion, and diagnostics will grow to $x billion globally. Growth will certainly depend on a number of factors including positive results from clinical trials, continued investment and regulatory strategies.

Our analysis indicates that North America holds the lions share of the microbiome therapeutic and diagnostic market in 2018 at $x million. This compares to $x million in Europe, $x million in Asia Pacific, and $x million in the Middle East. By 2023, North America will continue to dominate the market, with a revenue of $x billion, compared to $x million in Europe, $x million in Asia Pacific, and $x million in the Middle East.

Market Applications & Therapeutic Areas

Our Analysis has identified six key therapeutic areas that the microbiome therapeutic and diagnostic market is sub-divided into, namely:

Gastrointestinal

Metabolic

Cancer

Neurological

Autoimmune

Skin Disorders

The gastrointestinal therapeutic market is the most dominant, demanding $x million in revenue in 2018, which will rise to $x million by 2023. This is mainly due to disease states such as Clostridium difficile infection, Crohn's disease, ulcerative colitis and gastroenteritis. As mentioned throughout our report, this is the key area for active clinical trials and impending drug launches. This area currently demands x% of the overall market and will tend to dominate this space for the foreseeable future. The gastrointestinal diagnostic market is currently worth $x million and is set to reach $x million by 2023.

Second to this, metabolic therapeutics has a x% market share and in 2018 is worth $x million, and will hit $x million by 2023. The corresponding diagnostic market is currently worth about $x million, which will increase to $x million by 2023. The main indications within this field include diabetes, obesity and non alcoholic liver disease.

The microbiome cancer therapeutics market is currently worth $x million, or x% of the total market. Our analysis indicate that this will rise to $x million in 2023 and remain in third place behind metabolic and gastrointestinal disorders. The corresponding diagnostic submarket is currently worth $x million, which is set to grow to $x million in 2023.

The neurological market includes dominant indications such as Alzheimer's, Parkinson's, depression, anxiety disorders and autism. In 2018, the therapeutic submarket is worth $x million, with a x% share in the total market. This is set to increase

to $x million by 2023. The neurological microbiome diagnostic market is currently worth $x million, which will increase to over $x million by 2023.

Autoimmune disorders such as multiple sclerosis currently demand $x million in the microbiome therapeutics market, which will increase to $x million by 2023. The smaller diagnostic market is currently worth $x million, and will grow to $x million in 2023.

Skin disorders such as acne, dermatitis and psoriasis currently have about x% share in the overall microbiome market, and the therapeutics area is worth $x million in 2018. This is set to rise to $x million by 2023. The corresponding diagnostics area will hit $x million in 2023, from $x million in 2018.

Competitive Landscape

The microbiome field is highly competitive, especially within the inflammatory bowel disease and Clostridium difficile infection therapeutic markets. A wide range of big pharma, biotech, early-stage companies, academic institutions, government agencies and other public and private research organizations are involved in this space. The main therapeutic competitors within the microbiome industry are as follows:

Johnson & Johnson

Novartis International

Abbvie

Takeda

Merck & Co.,

Bristol Myers Squibb

Pfizer

Seres Therapeutics

Vedanta Biosciences

Finch Therapeutics

Enterome Bioscience

Second Genome

More specifically, companies involved in C. difficile infection include Actelion Pharmaceutical, Assembly Biosciences, AzurRx, Da Volterra, Pfizer, Merck, Merus, Rebiotix, Sanofi, Seres Therapeutics, Synthetic Biologics and Summit Therapeutics. Companies within the IBS-Constipation market include Ardelyx, Allergan, Ironwood Pharmaceuticals, Synergy Pharmaceuticals, Synthetic Biologics and Takeda. Within the pertussis market GlaxoSmithKline, Mitsubishi Tanabe Pharma Corporation and Sanofi are major players. BioMarin Pharmaceutical, Synthetic Biologics, Codexis and Synlogic are involved in the PKU market. Within the diagnostic sub-market, the following are the main players:

Metabiomics - Colon Polyp and Colon Cancer Test

Origin Sciences - Colorectal Cancer (CRC) Test

Enterome/AbbVie - IBD110

Key Questions Answered

What are the Main Microbiome Therapeutics in the Pipeline?

What are the Main Microbiome Diagnostics in the Pipeline?

What Key Biologics are in the Pipeline?

How Many Human Therapeutic and Diagnostic Microbiome Products are in the Pipeline?

What is the Human Therapeutic Pipeline like by Drug, Company and Stage of Development?

What Microbiome Therapeutics are in the Clostridium Difficile Infection Pipeline?

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What will the Microbiome Diagnostic Sub-Markets (Gastrointestinal, Metabolic, Cancer, Neurological, Autoimmune, Skin) be Worth in 2023?

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What Clinical Trials are Investigating Probiotics and Obesity?

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