

Cystic Fibrosis Therapeutics Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type

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Abstracts

Cystic Fibrosis Therapeutics Market Summary

Introduction and Market Overview

Cystic fibrosis (CF) therapeutics, including CFTR modulators, pancreatic enzyme supplements, mucolytics, and bronchodilators, address a genetic disorder affecting approximately 105,000 patients globally, with 40,000 in the U.S. and 50,000 in Europe. The market is driven by rising diagnosis rates, with newborn screening increasing detection by 20%, and transformative CFTR modulators like Trikafta, which improve lung function in 90% of F508del patients and reduce hospitalizations by 60%. Early intervention, extended patient lifespans (30% higher survival with early treatment), and supportive policies, with 60% of OECD countries covering CFTR modulators, fuel demand. The global CF therapeutics market is estimated at USD 6.0-10.0 billion in 2025, with a CAGR of 11%-16% through 2030.

Regional Market Trends

North America: The U.S. leads with widespread newborn screening and Trikafta adoption, while Canada emphasizes CF care access.

Europe: The UK, Germany, and France drive growth with robust reimbursement for CFTR modulators.

Asia Pacific: Australia expands CF screening, while Japan focuses on novel therapies.

Rest of the World: Brazil improves CF care infrastructure, while the Middle East addresses genetic screening.

Distribution Channel Analysis

Hospital Pharmacies: Expected growth of 11.5%-16.5%, driven by CFTR modulator prescriptions. Trends focus on specialized care.

Online Pharmacies: Projected growth of 12.0%-17.0%, linked to patient convenience. Advances emphasize digital access.

Retail Pharmacies: Anticipated growth of 10.5%-15.5%, covering supportive therapies. Trends highlight community-based care.

Type Analysis

CFTR Modulators: Expected growth of 12.0%-17.0%, valued for transformative outcomes. Trends focus on triple-combination therapies like Vanza.

Pancreatic Enzyme Supplements: Projected growth of 10.5%-15.5%, essential for digestion. Advances emphasize high-potency formulations.

Mucolytics: Anticipated growth of 10.0%-15.0%, used for airway clearance. Trends highlight inhalation therapies.

Bronchodilators: Expected growth of 9.5%-14.5%, suited for symptom relief. Developments prioritize long-acting agents.

Key Market Players

Vertex Pharmaceuticals: Pioneers CFTR modulators like Trikafta.

AbbVie: Develops pancreatic enzyme supplements.

Gilead: Focuses on CF supportive therapies.

Roche: Provides mucolytics for airway management.

Sionna Therapeutics: Innovates novel CFTR therapies.

Porter's Five Forces Analysis

Threat of New Entrants: Low, due to high R&D costs and regulatory barriers for orphan drugs.

Threat of Substitutes: Low, as CFTR modulators are unique, though gene therapies pose future competition.

Bargaining Power of Buyers: Moderate, with insurers negotiating prices, but limited alternatives strengthen providers.

Bargaining Power of Suppliers: Low, with multiple manufacturers of APIs.

Competitive Rivalry: Moderate, with Vertex dominating, but emerging players challenge with novel therapies.

Market Opportunities and Challenges

Opportunities:

Addressing 105,000 CF patients globally.

Leveraging CFTR modulators, improving outcomes for 90% of F508del patients.

Utilizing newborn screening, increasing diagnosis by 20%.

Supporting early intervention, raising survival by 30%.

Benefiting from 60% OECD reimbursement coverage.

Expanding research funding, like CFF's USD 6.6 million investment.

Challenges:

High costs of CFTR modulators limiting access.

Regulatory delays for novel therapies.

Limited CF infrastructure in developing regions.

Competition from emerging gene therapies.

Patient adherence issues with complex regimens.

Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

- 3.1 Research Scope
- 3.2 Research Sources
 - 3.2.1 Data Sources
 - 3.2.2 Assumptions
- 3.3 Research Method
- Chapter Four Market Landscape
- 4.1 Market Overview
- 4.2 Classification/Types
- 4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

- 5.1 Introduction
- 5.2 Drivers
- 5.3 Restraints
- 5.4 Opportunities
- 5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

- 6.1 Upstream/Suppliers Analysis
- 6.2 Cystic Fibrosis Therapeutics Analysis
 - 6.2.1 Technology Analysis
 - 6.2.2 Cost Analysis
 - 6.2.3 Market Channel Analysis
- 6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

- 7.1 Latest News
- 7.2 Merger and Acquisition

7.3 Planned/Future Project

7.4 Policy Dynamics

CHAPTER 8 HISTORICAL AND FORECAST CYSTIC FIBROSIS THERAPEUTICS MARKET IN NORTH AMERICA (2020-2030)

8.1 Cystic Fibrosis Therapeutics Market Size

8.2 Cystic Fibrosis Therapeutics Market by End Use

8.3 Competition by Players/Suppliers

8.4 Cystic Fibrosis Therapeutics Market Size by Type

8.5 Key Countries Analysis

8.5.1 United States

8.5.2 Canada

8.5.3 Mexico

CHAPTER 9 HISTORICAL AND FORECAST CYSTIC FIBROSIS THERAPEUTICS MARKET IN SOUTH AMERICA (2020-2030)

9.1 Cystic Fibrosis Therapeutics Market Size

9.2 Cystic Fibrosis Therapeutics Market by End Use

9.3 Competition by Players/Suppliers

9.4 Cystic Fibrosis Therapeutics Market Size by Type

9.5 Key Countries Analysis

9.5.1 Brazil

9.5.2 Argentina

9.5.3 Chile

9.5.4 Peru

CHAPTER 10 HISTORICAL AND FORECAST CYSTIC FIBROSIS THERAPEUTICS MARKET IN ASIA & PACIFIC (2020-2030)

10.1 Cystic Fibrosis Therapeutics Market Size

10.2 Cystic Fibrosis Therapeutics Market by End Use

10.3 Competition by Players/Suppliers

10.4 Cystic Fibrosis Therapeutics Market Size by Type

10.5 Key Countries Analysis

10.5.1 China

10.5.2 India

10.5.3 Japan

- 10.5.4 South Korea
- 10.5.5 Southeast Asia
- 10.5.6 Australia

CHAPTER 11 HISTORICAL AND FORECAST CYSTIC FIBROSIS THERAPEUTICS MARKET IN EUROPE (2020-2030)

- 11.1 Cystic Fibrosis Therapeutics Market Size
- 11.2 Cystic Fibrosis Therapeutics Market by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Cystic Fibrosis Therapeutics Market Size by Type
- 11.5 Key Countries Analysis
 - 11.5.1 Germany
 - 11.5.2 France
 - 11.5.3 United Kingdom
 - 11.5.4 Italy
 - 11.5.5 Spain
 - 11.5.6 Belgium
 - 11.5.7 Netherlands
 - 11.5.8 Austria
 - 11.5.9 Poland
 - 11.5.10 Russia

CHAPTER 12 HISTORICAL AND FORECAST CYSTIC FIBROSIS THERAPEUTICS MARKET IN MEA (2020-2030)

- 12.1 Cystic Fibrosis Therapeutics Market Size
- 12.2 Cystic Fibrosis Therapeutics Market by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Cystic Fibrosis Therapeutics Market Size by Type
- 12.5 Key Countries Analysis
 - 12.5.1 Egypt
 - 12.5.2 Israel
 - 12.5.3 South Africa
 - 12.5.4 Gulf Cooperation Council Countries
 - 12.5.5 Turkey

CHAPTER 13 SUMMARY FOR GLOBAL CYSTIC FIBROSIS THERAPEUTICS MARKET (2020-2025)

- 13.1 Cystic Fibrosis Therapeutics Market Size
- 13.2 Cystic Fibrosis Therapeutics Market by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Cystic Fibrosis Therapeutics Market Size by Type

CHAPTER 14 GLOBAL CYSTIC FIBROSIS THERAPEUTICS MARKET FORECAST (2025-2030)

- 14.1 Cystic Fibrosis Therapeutics Market Size Forecast
- 14.2 Cystic Fibrosis Therapeutics Application Forecast
- 14.3 Competition by Players/Suppliers
- 14.4 Cystic Fibrosis Therapeutics Type Forecast

CHAPTER 15 ANALYSIS OF GLOBAL KEY VENDORS

- 15.1 Vertex Pharmaceuticals
 - 15.1.1 Company Profile
 - 15.1.2 Main Business and Cystic Fibrosis Therapeutics Information
 - 15.1.3 SWOT Analysis of Vertex Pharmaceuticals
 - 15.1.4 Vertex Pharmaceuticals Cystic Fibrosis Therapeutics Revenue, Gross Margin and Market Share (2020-2025)
- 15.2 AbbVie
 - 15.2.1 Company Profile
 - 15.2.2 Main Business and Cystic Fibrosis Therapeutics Information
 - 15.2.3 SWOT Analysis of AbbVie
 - 15.2.4 AbbVie Cystic Fibrosis Therapeutics Revenue, Gross Margin and Market Share (2020-2025)
- 15.3 Gilead
 - 15.3.1 Company Profile
 - 15.3.2 Main Business and Cystic Fibrosis Therapeutics Information
 - 15.3.3 SWOT Analysis of Gilead
 - 15.3.4 Gilead Cystic Fibrosis Therapeutics Revenue, Gross Margin and Market Share (2020-2025)
- 15.4 Roche
 - 15.4.1 Company Profile
 - 15.4.2 Main Business and Cystic Fibrosis Therapeutics Information
 - 15.4.3 SWOT Analysis of Roche
 - 15.4.4 Roche Cystic Fibrosis Therapeutics Revenue, Gross Margin and Market Share

(2020-2025)

15.5 Alcresta Therapeutics

15.5.1 Company Profile

15.5.2 Main Business and Cystic Fibrosis Therapeutics Information

15.5.3 SWOT Analysis of Alcresta Therapeutics

15.5.4 Alcresta Therapeutics Cystic Fibrosis Therapeutics Revenue, Gross Margin and Market Share (2020-2025)

15.6 Chiesi Farmaceutici

15.6.1 Company Profile

15.6.2 Main Business and Cystic Fibrosis Therapeutics Information

15.6.3 SWOT Analysis of Chiesi Farmaceutici

15.6.4 Chiesi Farmaceutici Cystic Fibrosis Therapeutics Revenue, Gross Margin and Market Share (2020-2025)

15.7 Merck

15.7.1 Company Profile

15.7.2 Main Business and Cystic Fibrosis Therapeutics Information

15.7.3 SWOT Analysis of Merck

15.7.4 Merck Cystic Fibrosis Therapeutics Revenue, Gross Margin and Market Share (2020-2025)

15.8 AstraZeneca

15.8.1 Company Profile

15.8.2 Main Business and Cystic Fibrosis Therapeutics Information

15.8.3 SWOT Analysis of AstraZeneca

15.8.4 AstraZeneca Cystic Fibrosis Therapeutics Revenue, Gross Margin and Market Share (2020-2025)

Please ask for sample pages for full companies list

Tables and Figures

Table Abbreviation and Acronyms

Table Research Scope of Cystic Fibrosis Therapeutics Report

Table Data Sources of Cystic Fibrosis Therapeutics Report

Table Major Assumptions of Cystic Fibrosis Therapeutics Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure Cystic Fibrosis Therapeutics Picture

Table Cystic Fibrosis Therapeutics Classification

Table Cystic Fibrosis Therapeutics Applications

Table Drivers of Cystic Fibrosis Therapeutics Market

Table Restraints of Cystic Fibrosis Therapeutics Market

Table Opportunities of Cystic Fibrosis Therapeutics Market

Table Threats of Cystic Fibrosis Therapeutics Market
Table Covid-19 Impact For Cystic Fibrosis Therapeutics Market
Table Raw Materials Suppliers
Table Different Production Methods of Cystic Fibrosis Therapeutics
Table Cost Structure Analysis of Cystic Fibrosis Therapeutics
Table Key End Users
Table Latest News of Cystic Fibrosis Therapeutics Market
Table Merger and Acquisition
Table Planned/Future Project of Cystic Fibrosis Therapeutics Market
Table Policy of Cystic Fibrosis Therapeutics Market
Table 2020-2030 North America Cystic Fibrosis Therapeutics Market Size
Figure 2020-2030 North America Cystic Fibrosis Therapeutics Market Size and CAGR
Table 2020-2030 North America Cystic Fibrosis Therapeutics Market Size by Application
Table 2020-2025 North America Cystic Fibrosis Therapeutics Key Players Revenue
Table 2020-2025 North America Cystic Fibrosis Therapeutics Key Players Market Share
Table 2020-2030 North America Cystic Fibrosis Therapeutics Market Size by Type
Table 2020-2030 United States Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Canada Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Mexico Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 South America Cystic Fibrosis Therapeutics Market Size
Figure 2020-2030 South America Cystic Fibrosis Therapeutics Market Size and CAGR
Table 2020-2030 South America Cystic Fibrosis Therapeutics Market Size by Application
Table 2020-2025 South America Cystic Fibrosis Therapeutics Key Players Revenue
Table 2020-2025 South America Cystic Fibrosis Therapeutics Key Players Market Share
Table 2020-2030 South America Cystic Fibrosis Therapeutics Market Size by Type
Table 2020-2030 Brazil Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Argentina Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Chile Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Peru Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Asia & Pacific Cystic Fibrosis Therapeutics Market Size
Figure 2020-2030 Asia & Pacific Cystic Fibrosis Therapeutics Market Size and CAGR
Table 2020-2030 Asia & Pacific Cystic Fibrosis Therapeutics Market Size by Application
Table 2020-2025 Asia & Pacific Cystic Fibrosis Therapeutics Key Players Revenue
Table 2020-2025 Asia & Pacific Cystic Fibrosis Therapeutics Key Players Market Share
Table 2020-2030 Asia & Pacific Cystic Fibrosis Therapeutics Market Size by Type
Table 2020-2030 China Cystic Fibrosis Therapeutics Market Size

Table 2020-2030 India Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Japan Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 South Korea Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Southeast Asia Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Australia Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Europe Cystic Fibrosis Therapeutics Market Size
Figure 2020-2030 Europe Cystic Fibrosis Therapeutics Market Size and CAGR
Table 2020-2030 Europe Cystic Fibrosis Therapeutics Market Size by Application
Table 2020-2025 Europe Cystic Fibrosis Therapeutics Key Players Revenue
Table 2020-2025 Europe Cystic Fibrosis Therapeutics Key Players Market Share
Table 2020-2030 Europe Cystic Fibrosis Therapeutics Market Size by Type
Table 2020-2030 Germany Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 France Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 United Kingdom Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Italy Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Spain Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Belgium Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Netherlands Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Austria Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Poland Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Russia Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 MEA Cystic Fibrosis Therapeutics Market Size
Figure 2020-2030 MEA Cystic Fibrosis Therapeutics Market Size and CAGR
Table 2020-2030 MEA Cystic Fibrosis Therapeutics Market Size by Application
Table 2020-2025 MEA Cystic Fibrosis Therapeutics Key Players Revenue
Table 2020-2025 MEA Cystic Fibrosis Therapeutics Key Players Market Share
Table 2020-2030 MEA Cystic Fibrosis Therapeutics Market Size by Type
Table 2020-2030 Egypt Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Israel Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 South Africa Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Gulf Cooperation Council Countries Cystic Fibrosis Therapeutics Market Size
Table 2020-2030 Turkey Cystic Fibrosis Therapeutics Market Size
Table 2020-2025 Global Cystic Fibrosis Therapeutics Market Size by Region
Table 2020-2025 Global Cystic Fibrosis Therapeutics Market Size Share by Region
Table 2020-2025 Global Cystic Fibrosis Therapeutics Market Size by Application
Table 2020-2025 Global Cystic Fibrosis Therapeutics Market Share by Application
Table 2020-2025 Global Cystic Fibrosis Therapeutics Key Vendors Revenue
Figure 2020-2025 Global Cystic Fibrosis Therapeutics Market Size and Growth Rate

Table 2020-2025 Global Cystic Fibrosis Therapeutics Key Vendors Market Share
Table 2020-2025 Global Cystic Fibrosis Therapeutics Market Size by Type
Table 2020-2025 Global Cystic Fibrosis Therapeutics Market Share by Type
Table 2025-2030 Global Cystic Fibrosis Therapeutics Market Size by Region
Table 2025-2030 Global Cystic Fibrosis Therapeutics Market Size Share by Region
Table 2025-2030 Global Cystic Fibrosis Therapeutics Market Size by Application
Table 2025-2030 Global Cystic Fibrosis Therapeutics Market Share by Application
Table 2025-2030 Global Cystic Fibrosis Therapeutics Key Vendors Revenue
Figure 2025-2030 Global Cystic Fibrosis Therapeutics Market Size and Growth Rate
Table 2025-2030 Global Cystic Fibrosis Therapeutics Key Vendors Market Share
Table 2025-2030 Global Cystic Fibrosis Therapeutics Market Size by Type
Table 2025-2030 Cystic Fibrosis Therapeutics Global Market Share by Type

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