

Ultomiris Drug Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type

<https://marketpublishers.com/r/U579C97E647BEN.html>

Date: June 2025

Pages: 69

Price: US\$ 3,200.00 (Single User License)

ID: U579C97E647BEN

Abstracts

Intravenous Iron Drugs Market Summary

Introduction

Intravenous iron drugs represent a critical therapeutic category designed to address iron deficiency and iron deficiency anemia through direct parenteral administration, offering rapid and effective iron repletion when oral supplementation is inadequate or inappropriate. These medications encompass various formulations including iron dextran, iron sucrose, ferric carboxymaltose, and other specialized compounds, each designed to deliver elemental iron safely and efficiently to patients with severe iron deficiency states. The drugs are utilized across diverse clinical applications including chronic kidney disease, inflammatory bowel disease, cancer-related anemia, and other conditions causing significant iron depletion, administered primarily in hospital settings, dialysis centers, infusion clinics, and specialized treatment facilities. The market is driven by the alarming global prevalence of anemia, affecting nearly 2 billion people worldwide - more than low back pain or diabetes, and even exceeding the combined burden of anxiety and depression. This massive health challenge is particularly pronounced among vulnerable populations, with 40% of children aged 6-59 months, 37% of pregnant women, and 30% of women aged 15-49 affected by anemia globally.

Market Size and Growth Forecast

The global intravenous iron drugs market is projected to reach between USD 3.0 billion and USD 5.0 billion in 2025, with a compound annual growth rate (CAGR) of 6% to 10% through 2030, reflecting the increasing recognition of iron deficiency as a major global

health issue and the growing preference for intravenous iron therapy over oral supplementation in appropriate clinical settings.

Regional Analysis

North America: The United States leads the market with advanced chronic kidney disease management programs, comprehensive dialysis center networks, and widespread adoption of intravenous iron protocols, while Canada focuses on optimizing iron deficiency treatment in various clinical settings.

Europe: Germany, France, and the United Kingdom dominate the European market, driven by well-established nephrology practices, advanced inflammatory bowel disease treatment centers, and robust healthcare infrastructure supporting parenteral iron therapy.

Asia Pacific: China and India show significant growth potential due to large populations with high anemia prevalence and expanding healthcare infrastructure, while Japan leads in advanced iron deficiency management protocols and specialized treatment approaches.

Rest of the World: Brazil and other Latin American countries are expanding access to intravenous iron treatments through healthcare system improvements, while Middle Eastern nations are investing in comprehensive anemia management programs and specialized treatment facilities.

Application Analysis

Chronic Kidney Disease: Expected growth of 7-11%, driven by the high prevalence of iron deficiency in CKD patients and established treatment protocols in dialysis settings. Trends focus on optimizing iron dosing strategies and improving patient outcomes through regular iron monitoring.

Inflammatory Bowel Disease: Projected growth of 6-10%, linked to the significant iron malabsorption and chronic blood loss associated with IBD. Developments emphasize patient-friendly administration schedules and improved quality of life outcomes.

Cancer: Anticipated growth of 8-12%, reflecting the complex iron deficiency

issues in cancer patients receiving chemotherapy and experiencing treatment-related anemia. Advances prioritize rapid iron repletion and symptom improvement.

Other Diseases: Expected growth of 5-9%, including various conditions causing iron deficiency such as heavy menstrual bleeding, heart failure, and post-surgical states. Trends emphasize expanding clinical applications and evidence-based treatment protocols.

Type Analysis

Iron Dextran: Expected growth of 4-7%, representing traditional intravenous iron formulations with established safety profiles. Trends focus on optimizing administration protocols and managing rare adverse reactions.

Iron Sucrose: Projected growth of 6-9%, valued for its favorable safety profile and extensive clinical experience in dialysis populations. Advances highlight dosing optimization and treatment protocol standardization.

Ferric Carboxymaltose: Anticipated growth of 8-12%, reflecting its high-dose administration capability and reduced treatment burden. Developments prioritize expanding clinical applications and improving patient convenience.

Others: Expected growth of 7-11%, including newer formulations like ferric derisomaltose and iron isomaltoside, offering improved safety profiles and dosing flexibility.

Key Market Players

CSL Vifor maintains a leading position in the intravenous iron market through its comprehensive iron deficiency portfolio and specialized focus on iron metabolism disorders.

Fresenius Kabi provides critical iron sucrose formulations and maintains strong presence in dialysis and hospital markets worldwide.

American Regent offers diverse intravenous iron options with focus on quality

manufacturing and regulatory compliance.

Fresenius Medical Care integrates iron therapy with comprehensive dialysis care services, enhancing patient management approaches.

Pharmacosmos specializes in advanced iron formulations with emphasis on safety and efficacy profiles.

Daiichi Sankyo contributes through innovative iron compounds and research in iron metabolism.

Zydus Group provides cost-effective iron solutions with focus on emerging market access and manufacturing excellence.

These companies collectively drive market growth through continuous innovation in iron formulation technology and comprehensive patient support programs.

Porter's Five Forces Analysis

Threat of New Entrants: Moderate, due to significant regulatory requirements for parenteral iron products and established manufacturing standards, though opportunities exist for companies developing novel iron formulations or improved delivery systems.

Threat of Substitutes: Low to moderate, with oral iron supplements representing alternatives, though intravenous formulations offer superior efficacy and patient compliance in appropriate clinical settings.

Bargaining Power of Buyers: Moderate, with hospitals and healthcare systems having negotiating power for iron product pricing, while the medical necessity of iron replacement therapy maintains market stability.

Bargaining Power of Suppliers: Low to moderate, due to multiple iron compound suppliers and established pharmaceutical manufacturing networks, though specialized formulation requirements may limit supplier options.

Competitive Rivalry: High, with multiple pharmaceutical companies competing on safety profiles, dosing convenience, administration flexibility, and pricing

across various iron formulations.

Market Opportunities and Challenges

Opportunities:

The staggering global burden of anemia, affecting nearly 2 billion people worldwide and representing a health challenge greater than low back pain or diabetes, creates enormous treatment demand. The condition's impact is particularly severe among vulnerable populations, with 40% of children aged 6-59 months, 37% of pregnant women, and 30% of women aged 15-49 years affected by anemia globally. In 2019, anemia caused 50 million years of healthy life lost, underscoring its massive public health impact. Dietary iron deficiency represents the primary cause of anemia in 2021, accounting for 66.2% of total anemia cases and affecting 825 million women and 444 million children worldwide. This massive population of iron-deficient individuals represents a substantial market opportunity for effective intravenous iron therapy. The growing recognition of iron deficiency without anemia as a clinically significant condition further expands the potential patient population. Advances in iron formulation technology, including high-dose single-administration products, improve patient convenience and healthcare efficiency. The increasing prevalence of chronic kidney disease, inflammatory bowel disease, and cancer globally creates expanding demand for specialized iron replacement therapy.

Challenges:

High costs of intravenous iron formulations compared to oral supplements limit adoption in cost-sensitive healthcare environments. Safety concerns regarding rare but serious adverse reactions, including anaphylaxis and iron overload, require careful patient monitoring and specialized administration protocols. Complex dosing calculations and monitoring requirements necessitate specialized healthcare provider training and expertise. Competition from newer oral iron formulations with improved tolerability may reduce demand for intravenous alternatives in some patient populations. Regulatory complexity for parenteral iron products requires extensive safety data and manufacturing quality standards. Healthcare infrastructure limitations in some regions restrict access to appropriate intravenous administration facilities and trained personnel.

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 Ultomiris Drug 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 ULTOMIRIS DRUG MARKET IN NORTH AMERICA (2020-2030)

8.1 Ultomiris Drug Market Size

8.2 Ultomiris Drug Market by End Use

8.3 Competition by Players/Suppliers

8.4 Ultomiris Drug 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 ULTOMIRIS DRUG MARKET IN SOUTH AMERICA (2020-2030)

9.1 Ultomiris Drug Market Size

9.2 Ultomiris Drug Market by End Use

9.3 Competition by Players/Suppliers

9.4 Ultomiris Drug 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 ULTOMIRIS DRUG MARKET IN ASIA & PACIFIC (2020-2030)

10.1 Ultomiris Drug Market Size

10.2 Ultomiris Drug Market by End Use

10.3 Competition by Players/Suppliers

10.4 Ultomiris Drug 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 ULTOMIRIS DRUG MARKET IN EUROPE (2020-2030)

- 11.1 Ultomiris Drug Market Size
- 11.2 Ultomiris Drug Market by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Ultomiris Drug 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 ULTOMIRIS DRUG MARKET IN MEA (2020-2030)

- 12.1 Ultomiris Drug Market Size
- 12.2 Ultomiris Drug Market by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Ultomiris Drug 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 ULTOMIRIS DRUG MARKET (2020-2025)

- 13.1 Ultomiris Drug Market Size
- 13.2 Ultomiris Drug Market by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Ultomiris Drug Market Size by Type

CHAPTER 14 GLOBAL ULTOMIRIS DRUG MARKET FORECAST (2025-2030)

- 14.1 Ultomiris Drug Market Size Forecast
- 14.2 Ultomiris Drug Application Forecast
- 14.3 Competition by Players/Suppliers
- 14.4 Ultomiris Drug Type Forecast

CHAPTER 15 ANALYSIS OF GLOBAL KEY VENDORS

Please ask for sample pages for full companies list

Tables and Figures

Table Abbreviation and Acronyms

Table Research Scope of Ultomiris Drug Report

Table Data Sources of Ultomiris Drug Report

Table Major Assumptions of Ultomiris Drug Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure Ultomiris Drug Picture

Table Ultomiris Drug Classification

Table Ultomiris Drug Applications

Table Drivers of Ultomiris Drug Market

Table Restraints of Ultomiris Drug Market

Table Opportunities of Ultomiris Drug Market

Table Threats of Ultomiris Drug Market

Table Covid-19 Impact For Ultomiris Drug Market

Table Raw Materials Suppliers

Table Different Production Methods of Ultomiris Drug

Table Cost Structure Analysis of Ultomiris Drug

Table Key End Users

Table Latest News of Ultomiris Drug Market

Table Merger and Acquisition

Table Planned/Future Project of Ultomiris Drug Market

Table Policy of Ultomiris Drug Market

Table 2020-2030 North America Ultomiris Drug Market Size

| |
|--|
| Figure 2020-2030 North America Ultomiris Drug Market Size and CAGR |
| Table 2020-2030 North America Ultomiris Drug Market Size by Application |
| Table 2020-2025 North America Ultomiris Drug Key Players Revenue |
| Table 2020-2025 North America Ultomiris Drug Key Players Market Share |
| Table 2020-2030 North America Ultomiris Drug Market Size by Type |
| Table 2020-2030 United States Ultomiris Drug Market Size |
| Table 2020-2030 Canada Ultomiris Drug Market Size |
| Table 2020-2030 Mexico Ultomiris Drug Market Size |
| Table 2020-2030 South America Ultomiris Drug Market Size |
| Figure 2020-2030 South America Ultomiris Drug Market Size and CAGR |
| Table 2020-2030 South America Ultomiris Drug Market Size by Application |
| Table 2020-2025 South America Ultomiris Drug Key Players Revenue |
| Table 2020-2025 South America Ultomiris Drug Key Players Market Share |
| Table 2020-2030 South America Ultomiris Drug Market Size by Type |
| Table 2020-2030 Brazil Ultomiris Drug Market Size |
| Table 2020-2030 Argentina Ultomiris Drug Market Size |
| Table 2020-2030 Chile Ultomiris Drug Market Size |
| Table 2020-2030 Peru Ultomiris Drug Market Size |
| Table 2020-2030 Asia & Pacific Ultomiris Drug Market Size |
| Figure 2020-2030 Asia & Pacific Ultomiris Drug Market Size and CAGR |
| Table 2020-2030 Asia & Pacific Ultomiris Drug Market Size by Application |
| Table 2020-2025 Asia & Pacific Ultomiris Drug Key Players Revenue |
| Table 2020-2025 Asia & Pacific Ultomiris Drug Key Players Market Share |
| Table 2020-2030 Asia & Pacific Ultomiris Drug Market Size by Type |
| Table 2020-2030 China Ultomiris Drug Market Size |
| Table 2020-2030 India Ultomiris Drug Market Size |
| Table 2020-2030 Japan Ultomiris Drug Market Size |
| Table 2020-2030 South Korea Ultomiris Drug Market Size |
| Table 2020-2030 Southeast Asia Ultomiris Drug Market Size |
| Table 2020-2030 Australia Ultomiris Drug Market Size |
| Table 2020-2030 Europe Ultomiris Drug Market Size |
| Figure 2020-2030 Europe Ultomiris Drug Market Size and CAGR |
| Table 2020-2030 Europe Ultomiris Drug Market Size by Application |
| Table 2020-2025 Europe Ultomiris Drug Key Players Revenue |
| Table 2020-2025 Europe Ultomiris Drug Key Players Market Share |
| Table 2020-2030 Europe Ultomiris Drug Market Size by Type |
| Table 2020-2030 Germany Ultomiris Drug Market Size |
| Table 2020-2030 France Ultomiris Drug Market Size |
| Table 2020-2030 United Kingdom Ultomiris Drug Market Size |

| |
|---|
| Table 2020-2030 Italy Ultomiris Drug Market Size |
| Table 2020-2030 Spain Ultomiris Drug Market Size |
| Table 2020-2030 Belgium Ultomiris Drug Market Size |
| Table 2020-2030 Netherlands Ultomiris Drug Market Size |
| Table 2020-2030 Austria Ultomiris Drug Market Size |
| Table 2020-2030 Poland Ultomiris Drug Market Size |
| Table 2020-2030 Russia Ultomiris Drug Market Size |
| Table 2020-2030 MEA Ultomiris Drug Market Size |
| Figure 2020-2030 MEA Ultomiris Drug Market Size and CAGR |
| Table 2020-2030 MEA Ultomiris Drug Market Size by Application |
| Table 2020-2025 MEA Ultomiris Drug Key Players Revenue |
| Table 2020-2025 MEA Ultomiris Drug Key Players Market Share |
| Table 2020-2030 MEA Ultomiris Drug Market Size by Type |
| Table 2020-2030 Egypt Ultomiris Drug Market Size |
| Table 2020-2030 Israel Ultomiris Drug Market Size |
| Table 2020-2030 South Africa Ultomiris Drug Market Size |
| Table 2020-2030 Gulf Cooperation Council Countries Ultomiris Drug Market Size |
| Table 2020-2030 Turkey Ultomiris Drug Market Size |
| Table 2020-2025 Global Ultomiris Drug Market Size by Region |
| Table 2020-2025 Global Ultomiris Drug Market Size Share by Region |
| Table 2020-2025 Global Ultomiris Drug Market Size by Application |
| Table 2020-2025 Global Ultomiris Drug Market Share by Application |
| Table 2020-2025 Global Ultomiris Drug Key Vendors Revenue |
| Figure 2020-2025 Global Ultomiris Drug Market Size and Growth Rate |
| Table 2020-2025 Global Ultomiris Drug Key Vendors Market Share |
| Table 2020-2025 Global Ultomiris Drug Market Size by Type |
| Table 2020-2025 Global Ultomiris Drug Market Share by Type |
| Table 2025-2030 Global Ultomiris Drug Market Size by Region |
| Table 2025-2030 Global Ultomiris Drug Market Size Share by Region |
| Table 2025-2030 Global Ultomiris Drug Market Size by Application |
| Table 2025-2030 Global Ultomiris Drug Market Share by Application |
| Table 2025-2030 Global Ultomiris Drug Key Vendors Revenue |
| Figure 2025-2030 Global Ultomiris Drug Market Size and Growth Rate |
| Table 2025-2030 Global Ultomiris Drug Key Vendors Market Share |
| Table 2025-2030 Global Ultomiris Drug Market Size by Type |
| Table 2025-2030 Ultomiris Drug Global Market Share by Type |

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