

Ankylosing Spondylitis Therapeutics Market, 2028- Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Drug (Cosentyx, Humira, Simponi, Remicade, Enbrel, Cimzia), By End Use (Hospitals, Clinics, Others), By Region, By Competition.

<https://marketpublishers.com/r/A0349912D480EN.html>

Date: October 2023

Pages: 180

Price: US\$ 4,500.00 (Single User License)

ID: A0349912D480EN

Abstracts

The Global Ankylosing Spondylitis Therapeutics Market has valued at USD 4.66 billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.24% through 2028. Ankylosing Spondylitis Therapeutics (AS) is a chronic inflammatory autoimmune disease that primarily affects the spine, leading to pain, stiffness, and decreased mobility. This condition is part of a group of disorders known as spondyloarthritis, which can also affect other joints and organs. The global Ankylosing Spondylitis Therapeutics market has been witnessing significant developments in recent years, driven by advances in research, innovative therapies, and increasing awareness. Ankylosing Spondylitis Therapeutics is characterized by inflammation of the sacroiliac joints, which connect the base of the spine (sacrum) to the pelvis. Over time, this inflammation can lead to the fusion of spinal vertebrae, causing a loss of flexibility and posture changes. The disease typically begins in early adulthood, with symptoms such as lower back pain and morning stiffness. Early diagnosis and effective management are crucial for improving patients' quality of life. AS is a global concern, affecting millions of people worldwide. The exact prevalence varies among different regions, with higher rates in certain populations. While the cause of AS remains unclear, genetic factors, particularly the HLA-B27 gene, play a significant role in its development.

The global AS market has witnessed substantial growth in recent years due to several

factors. Improved awareness among healthcare professionals and patients has led to earlier diagnosis and treatment, enhancing the overall market growth. The advent of biologic drugs, such as tumor necrosis factor (TNF) inhibitors, has revolutionized AS treatment. These drugs target specific components of the immune system, providing more effective symptom management. Pharmaceutical companies are investing heavily in research and development to identify novel therapeutic targets and drugs. This has resulted in a pipeline of potential treatments in various stages of development. AS is more commonly diagnosed in younger adults, and as the global population ages, the number of AS patients is expected to rise, driving market expansion.

The treatment of AS primarily focuses on symptom management, pain relief, and slowing down disease progression. Nonsteroidal anti-inflammatory drugs (NSAIDs) are commonly prescribed to alleviate pain and inflammation. Additionally, physical therapy and exercise play a crucial role in maintaining joint mobility. Biologic therapies, such as TNF inhibitors (e.g., adalimumab, etanercept), have revolutionized AS treatment. These drugs can effectively reduce inflammation and improve patients' quality of life. However, they come with a significant cost and potential side effects, including increased susceptibility to infections.

The global AS market is poised for further growth and innovation. Several key trends and developments are shaping its future. Ongoing research is uncovering new treatment targets and potential therapeutic agents beyond TNF inhibitors. This includes drugs targeting interleukins and other immune system components. Advancements in genetics and biomarker research are paving the way for personalized treatment approaches, ensuring that patients receive the most effective therapies tailored to their specific needs. As patents for some biologic drugs expire, the introduction of biosimilars may increase affordability and access to effective treatments. The integration of telemedicine is making healthcare more accessible for AS patients, allowing remote monitoring and consultations, particularly relevant for individuals with limited mobility.

Key Market Drivers

increasing prevalence of Ankylosing Spondylitis Therapeutics is Driving the Global Ankylosing Spondylitis Therapeutics Market

Ankylosing Spondylitis Therapeutics (AS) is a chronic and potentially debilitating inflammatory condition that primarily affects the spine and sacroiliac joints. Over the past few decades, the prevalence of AS has been steadily increasing worldwide, leading to a growing demand for effective treatment options. This rise in AS cases has

not only impacted the lives of individuals but has also driven the growth of the global Ankylosing Spondylitis Therapeutics market. Ankylosing Spondylitis Therapeutics is a type of autoimmune disease that primarily affects the axial skeleton, including the spine, pelvis, and hip joints. It is characterized by inflammation, pain, and stiffness, often leading to fusion of the spinal vertebrae and reduced mobility. AS typically strikes individuals in their late teens to early 40s, although it can affect people of all ages. Historically, AS has been considered a rare condition, but recent epidemiological studies have shown a different trend. The exact cause of AS remains unknown, but a combination of genetic and environmental factors is believed to play a significant role in its development. Genetic factors, particularly the presence of the HLA-B27 gene, increase the risk of developing AS. Environmental factors such as smoking and bacterial infections have also been linked to the disease.

One key factor contributing to the increasing prevalence of AS is improved diagnostic techniques. Medical advancements, including the development of more sensitive imaging tools like magnetic resonance imaging (MRI) and better awareness among healthcare professionals, have led to earlier and more accurate diagnoses. Changes in population demographics, including an aging population and shifts in lifestyle and diet, have contributed to the rise in AS cases. As people live longer and engage in different activities, the likelihood of developing AS increases. There is now greater awareness of AS among both patients and healthcare providers. This has led to increased reporting of symptoms and early detection, resulting in more cases being documented in medical records. The genetic component of AS remains a significant factor. Those with a family history of AS or possessing the HLA-B27 gene are at a higher risk, and as genetic factors continue to play a role in our population, more cases are likely to emerge.

The rising prevalence of AS has had a direct impact on the global Ankylosing Spondylitis Therapeutics market. Pharmaceutical companies, healthcare providers, and researchers have recognized the need for more effective treatments and therapies to address the increasing number of AS cases. As a result, the market for AS treatments has experienced significant growth.

Increasing Patient Advocacy and Awareness Fuels Growth in Global Ankylosing Spondylitis Therapeutics Market

Over the past decade, patient advocacy groups and individuals living with AS have played a pivotal role in raising awareness about the condition. These advocates have worked tirelessly to educate the public, healthcare professionals, and policymakers about AS, its symptoms, and the importance of early diagnosis and treatment. They

have used various platforms, including social media, support groups, and awareness campaigns, to share their experiences and knowledge. One of the most significant achievements of patient advocacy groups has been the development of educational resources and tools that empower both patients and healthcare providers. These resources help in recognizing the signs and symptoms of AS, promoting early diagnosis, and providing guidance on available treatments and management strategies.

Patient advocacy groups have collaborated with healthcare organizations, pharmaceutical companies, and government agencies to launch awareness campaigns and initiatives aimed at AS. These efforts have contributed to a broader understanding of the disease, resulting in earlier diagnosis and improved patient outcomes.

Patient advocacy groups have established online communities and forums where individuals with AS can connect, share their stories, and seek advice from peers. These communities provide a sense of belonging and enable patients to stay informed about the latest developments in AS research and treatment. Pharmaceutical companies have partnered with patient advocacy groups to launch disease awareness campaigns. These campaigns often feature educational materials, social media outreach, and public events to educate the public about AS.

Greater awareness has led to more individuals seeking medical attention at the onset of AS symptoms. Early diagnosis and intervention are crucial for managing the disease effectively. As a result, the demand for AS medications and therapies has increased. Pharmaceutical companies have been motivated to invest in research and development efforts aimed at discovering more effective treatments for AS. These efforts have resulted in the development of innovative therapies that offer improved outcomes for patients. The growing prevalence of AS diagnoses has expanded the global AS market. It has created opportunities for pharmaceutical companies to introduce new medications and treatments, leading to market growth. The patient advocacy movement has encouraged a patient-centric approach in the healthcare industry. This shift emphasizes the importance of involving patients in decision-making processes, which has led to more tailored treatments and better patient experiences.

Key Market Challenges

Limited Awareness and Early Diagnosis

One of the fundamental challenges in the AS market is the lack of awareness among both healthcare professionals and the general public. AS is often misdiagnosed or

diagnosed late, delaying proper treatment and potentially worsening the patient's condition. Raising awareness about the disease, its symptoms, and the importance of early diagnosis is crucial to improving patient outcomes.

Complex Diagnosis and Misdiagnosis

AS diagnosis can be challenging due to its variable symptoms and the need for specialized tests, such as HLA-B27 genetic testing and imaging studies like MRI or X-rays. Misdiagnosis or delayed diagnosis can lead to inadequate treatment and prolonged suffering for patients. Ensuring that healthcare providers have access to the necessary tools and knowledge for accurate diagnosis is essential.

Limited Treatment Options

While there have been significant advancements in AS treatments over the years, there remains a limited number of approved drugs specifically targeting this condition. The market lacks diversity in treatment options, which can result in patients not responding well to available therapies. Expanding the treatment arsenal is essential to meet the unique needs of individual patients.

High Treatment Costs

Biologic medications, which are commonly used in AS treatment, can be prohibitively expensive. High treatment costs create barriers to access for many patients, particularly those without adequate insurance coverage. Reducing the financial burden of AS treatments is necessary to ensure that all patients can receive the care they need.

Side Effects and Safety Concerns

Biologic medications, though effective, may come with a range of side effects and long-term safety concerns. Balancing the benefits of treatment with potential risks can be challenging for both patients and healthcare providers. Continuous research into safer treatment options and better management of side effects is essential.

Variability in Disease Presentation

Ankylosing Spondylitis Therapeutics exhibits considerable variability in disease presentation, making it difficult to develop standardized treatment approaches. Tailoring treatments to individual patients' need and disease severity can be a complex process

that requires a deep understanding of the disease.

Limited Research and Development

Compared to other autoimmune diseases, AS has received relatively less attention in terms of research and development. A lack of investment in AS research can slow down the development of new therapies and hinder progress in the market.

Access to Specialized Care

Access to healthcare professionals with expertise in AS management is limited in many regions. Patients often struggle to find rheumatologists and other specialists who are knowledgeable about the disease, resulting in suboptimal care.

Key Market Trends

Technological Advancements

The accurate and early diagnosis of AS is crucial for effective management. Technological advancements have revolutionized the way AS is diagnosed. Magnetic Resonance Imaging (MRI) and computed tomography (CT) scans are now widely used to detect inflammation and structural damage in the spine and sacroiliac joints. These imaging techniques offer high-resolution images, allowing healthcare professionals to identify AS at its early stages when treatment can be most effective. Additionally, the development of AI-driven image analysis tools has improved the speed and accuracy of AS diagnosis. Machine learning algorithms can analyze MRI and CT scans to identify subtle changes that might be missed by human radiologists, ensuring earlier and more accurate diagnoses.

In the past, AS was primarily managed with non-steroidal anti-inflammatory drugs (NSAIDs) and physical therapy. However, technological advancements in the field of biotechnology have given rise to a new class of drugs known as biological therapies. These medications target specific proteins in the immune system that contribute to the inflammation seen in AS. Biological therapies, such as tumor necrosis factor (TNF) inhibitors, have been a game-changer for AS patients. These drugs have shown remarkable efficacy in reducing pain, inflammation, and stiffness associated with the condition. Moreover, the development of biosimilars, which are more affordable versions of biologics, has increased accessibility to these life-changing treatments.

The COVID-19 pandemic accelerated the adoption of telemedicine and remote monitoring technologies across various medical specialties, including rheumatology. For AS patients, this has meant easier access to healthcare professionals and improved disease management. Telemedicine allows individuals with AS to consult with rheumatologists and other specialists from the comfort of their homes, reducing the need for travel and facilitating more frequent check-ups. Patients can discuss their symptoms, medication adjustments, and treatment plans with their healthcare providers through video calls and secure messaging platforms. Furthermore, wearable devices and smartphone apps have enabled remote monitoring of AS symptoms. These technologies can track physical activity, sleep patterns, and pain levels, providing valuable data for both patients and healthcare providers to better understand and manage the disease.

The internet and mobile applications have made it easier for AS patients to access information, educational resources, and support networks. Online platforms and mobile apps provide a wealth of information about AS, including its symptoms, treatment options, and lifestyle recommendations. Patients can also connect with others who share their experiences, providing emotional support and practical advice. Additionally, chatbots and virtual assistants powered by AI have been developed to answer common questions and provide real-time assistance to AS patients. These tools are available 24/7, offering immediate help when needed.

Segmental Insights

Drug Insights

Based on the drug, the Humira drug segment emerged as the dominant player in the global market for Ankylosing Spondylitis Therapeutics Market in 2022. Humira has demonstrated efficacy in reducing the symptoms and progression of ankylosing spondylitis in numerous clinical trials. It is known to alleviate pain, stiffness, and inflammation in patients with AS. Its proven track record made it a trusted and go-to option for both patients and healthcare providers. Humira is a biologic drug, specifically a tumor necrosis factor-alpha (TNF-alpha) inhibitor. AS is believed to involve an overproduction of TNF-alpha, which plays a key role in inflammation. By inhibiting TNF-alpha, Humira helps to control the inflammatory response and manage the symptoms of AS. While Humira does come with potential side effects, its safety profile has been well-documented through extensive clinical use. This gave patients and healthcare providers confidence in its use. Humira is administered via subcutaneous injections, which many patients find more convenient than intravenous infusions. Its dosing schedule is typically

every two weeks or once a month, depending on the specific condition and the patient's response. This ease of administration improves patient compliance. By the time of my last update, Humira had been on the market for many years and had gained extensive experience and data regarding its use in AS. This long-term presence allowed it to become a trusted and widely prescribed treatment option. The manufacturer, AbbVie, invested heavily in marketing and promotion of Humira, making it a well-recognized brand in the AS treatment space. This branding helped maintain its dominant position in the market. Due to its patent protection and intellectual property rights, Humira had limited competition from biosimilar products until those patents began to expire in certain regions, leading to the eventual introduction of biosimilar versions of adalimumab. Many insurance plans covered Humira, making it more accessible and affordable for patients.

End Use Insights

The hospital segment is projected to experience rapid growth during the forecast period. Hospitals typically have specialized departments or units, such as rheumatology departments, that focus on treating autoimmune diseases like ankylosing spondylitis. Rheumatologists, who are experts in managing AS, are more commonly found in hospital settings. This specialization is crucial for providing the best care and treatment options for AS patients. Hospitals often have access to the latest and most advanced treatments for ankylosing spondylitis. This may include biologic therapies, which have shown efficacy in managing the condition. These therapies are often administered in a hospital setting, requiring close monitoring due to potential side effects. Ankylosing spondylitis can lead to physical limitations, and rehabilitation services such as physical therapy are often an integral part of the treatment plan. Hospitals typically offer comprehensive rehabilitation services, which can be essential for AS patients in improving their mobility and quality of life. The management of AS may require a multidisciplinary approach involving rheumatologists, physical therapists, orthopedic surgeons, and other specialists. Hospitals are well-suited to facilitate collaboration among these healthcare professionals to provide comprehensive care for AS patients. AS patients may experience complications or exacerbations of their condition that require emergency medical attention. Hospitals are equipped to handle such situations, ensuring timely and appropriate care in case of emergencies. Hospitals often engage in research and clinical trials related to ankylosing spondylitis. This research can lead to the development of new treatments and therapies, further solidifying their role in the AS market.

Regional Insights

North America emerged as the dominant player in the global Ankylosing Spondylitis Therapeutics market in 2022, holding the largest market share in terms of value. North America, particularly the United States and Canada, boasts advanced healthcare infrastructures with a high concentration of hospitals, clinics, and healthcare professionals. This allows for easier access to diagnosis and treatment of AS, making it a significant player in the global market. North America is home to many pharmaceutical and biotechnology companies with substantial resources dedicated to research and development of AS treatments. These companies often conduct clinical trials and bring innovative therapies to market, contributing to the region's dominance. North America has stringent regulatory agencies like the U.S. Food and Drug Administration (FDA) and Health Canada, which ensure the safety and efficacy of new AS treatments. These agencies often set the standards for the approval of drugs and therapies, attracting investments and fostering innovation.

Key Market Players

AbbVie, Inc.

Amgen, Inc.

Pfizer, Inc.

Novartis AG

Eli Lilly and Company

UCB, Inc.

Johnson & Johnson Services, Inc.

Merck & Co., Inc

Report Scope:

In this report, the Global Ankylosing Spondylitis Therapeutics Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Ankylosing Spondylitis Therapeutics Market, By Drug:

Cosentyx

Humira

Simponi

Remicade

Enbrel

Cimzia

Ankylosing Spondylitis Therapeutics Market, By End Use:

Hospitals

Clinics

Others

Ankylosing Spondylitis Therapeutics Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Ankylosing Spondylitis Therapeutics Market.

Available Customizations:

Global Ankylosing Spondylitis Therapeutics market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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