

Anti-Vascular Endothelial Growth Factor Therapeutics Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029 Segmented By Product (Eylea, Lucentis, Beovu), By Disease (Macular Edema, Diabetic Retinopathy, Retinal Vein Occlusion, Age-related Macular Degeneration), By End Users (Hospitals & Clinics, Ambulatory Care centers, Others), By Region and Competition

<https://marketpublishers.com/r/A32C46F80EC9EN.html>

Date: February 2024

Pages: 186

Price: US\$ 4,900.00 (Single User License)

ID: A32C46F80EC9EN

Abstracts

Global Anti-Vascular Endothelial Growth Factor Therapeutics Market was valued at USD 12.38 Billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 2.25% through 2029. The increase in the prevalence of ophthalmic diseases is expected to propel the growth of the anti-vascular endothelial growth factor therapeutics market going forward. The prevalence of ophthalmic diseases refers to the number or proportion of individuals within a given population who have been diagnosed with or exhibit specific eye conditions or diseases. Anti-vascular endothelial growth factor (VEGF) therapeutics help reduce the prevalence of ophthalmic diseases by effectively treating ailments such as wet age-related macular degeneration (AMD), diabetic retinopathy, and retinal vein occlusion. For instance, in October 2022, according to World Health Organization, a Switzerland-based international public health organization, globally, around 2.2 billion people have near or distance vision impairment, and 1 billion people suffer from near or distance vision impairment. Further, among these, 88.4 million are suffering from refractive error, 94 million have cataracts, 8 million have age-related macular degeneration, and around 3.9 million have diabetic retinopathy. Therefore, the increase in the prevalence of ophthalmic diseases is driving the growth of the anti-vascular endothelial growth factor therapeutics market.

Advancements in therapeutics are a key trend gaining popularity in the anti-vascular endothelial growth factor therapeutics market. Companies operating in the anti-vascular endothelial growth factor therapeutics market are adopting advanced therapeutics to sustain their position in the market. For instance, in May 2022, Ashvattha Therapeutics Inc, a US-based clinical-stage biopharmaceutical company, released phase 1 safety data for healthy subjects for subcutaneous anti-VEGF wet AMD (age-related macular degeneration) and DME (diabetic macular edema) candidates. D-4517.2 therapy is a first-in-class therapy developed to address the unmet needs of DME conditions. D-4517.2 therapy is being developed for self-administration using an autoinjector. The autoinjector D-4517.2 enable patients to self-administer the medication once a month in the comfort of their home.

In September 2021, AbbVie Inc., a US-based pharmaceutical and medicine innovator company, entered into a partnership agreement with Regenxbio Inc. for \$370 million. This partnership will combine eye care and gene therapy expertise to develop anti-VEGF eye gene therapy. This developmental study uses RGX-314 gene therapy which inhibits VEGF and is designed for treating wet age-related macular degeneration (AMD), retinal diseases, and diabetic retinopathy. Regenxbio Inc is a US-based biotechnology company focused on developing recombinant gene therapies.

Key Market Drivers

Increasing incidence of age-related macular degeneration

The increasing incidence of age-related macular degeneration (AMD) is a significant driver for the growth of Anti-Vascular Endothelial Growth Factor (Anti-VEGF) therapeutics. AMD is a progressive eye disease and a leading cause of vision loss, primarily affecting older adults. There are two forms of AMD: wet (neovascular) and dry (atrophic). Wet AMD, characterized by abnormal blood vessel growth beneath the retina, is particularly responsive to Anti-VEGF treatments.

As the global population continues to age, the prevalence of AMD is rising. This demographic shift is a direct contributor to the growing demand for Anti-VEGF therapeutics. In many developed countries, the elderly population is expanding, which, in turn, increases the number of individuals at risk for AMD. AMD often manifests after the age of 50, and its incidence significantly rises with each passing decade, making it more common among those aged 65 and older.

The impact of AMD on patients cannot be overstated. It impairs central vision, hindering tasks like reading, recognizing faces, and driving. As a result, there is a strong motivation among both patients and healthcare providers to seek effective treatments. Anti-VEGF therapies have proven to be a game-changer in managing wet AMD by inhibiting the growth of abnormal blood vessels in the retina and reducing vision loss. Moreover, ongoing research and development in the field of ophthalmology continue to improve the efficacy and safety of Anti-VEGF drugs. These developments offer hope to patients by enhancing their visual outcomes and potentially reducing the frequency of injections required, which can improve patient compliance and quality of life.

The economic burden of AMD cannot be ignored, with substantial healthcare costs associated with its treatment and rehabilitation. As AMD prevalence escalates due to the aging population, these economic considerations make investments in Anti-VEGF therapeutics an attractive option for healthcare stakeholders. In conclusion, the increasing incidence of age-related macular degeneration, driven by a growing elderly population, underscores the vital role of Anti-VEGF therapeutics in preserving and restoring vision. This trend is expected to continue, as advancements in treatment options further improve outcomes and quality of life for those affected by this debilitating eye condition.

Expanding applications in oncology

The expanding applications of Anti-Vascular Endothelial Growth Factor (Anti-VEGF) therapeutics in oncology are playing a pivotal role in driving their development and use. Originally developed to treat eye conditions, Anti-VEGF drugs have found substantial success in combating cancer by targeting the blood vessels that nourish tumors, ultimately inhibiting their growth. This dual-purpose application has opened up new horizons in the field of oncology. Anti-VEGF therapies have become an integral component of cancer treatment, especially for solid tumors. By blocking the formation of new blood vessels (angiogenesis) that supply nutrients and oxygen to tumors, these drugs can essentially starve the cancer cells, slowing their growth and potentially shrinking the tumor. This approach is particularly effective in addressing cancers such as colorectal, lung, renal, and ovarian carcinomas, among others. Furthermore, Anti-VEGF therapeutics are often used in combination with traditional cancer treatments like chemotherapy and radiation therapy. This synergistic approach enhances the overall effectiveness of cancer therapy. The combination of Anti-VEGF drugs with these treatments can lead to improved response rates, delayed disease progression, and even increased survival rates for some cancer patients.

The development of novel Anti-VEGF agents and the exploration of their potential in various types of cancer continue to fuel research and investment in this field. Researchers are striving to identify new biomarkers, refine treatment regimens, and enhance the understanding of how Anti-VEGF therapy can be tailored to individual patient needs, thus paving the way for more personalized and effective oncological care.

The economic implications of expanding Anti-VEGF applications in oncology are noteworthy, as the cost of cancer treatment and healthcare resource utilization continue to rise. Anti-VEGF drugs have the potential to not only improve patient outcomes but also reduce the burden on healthcare systems by potentially lowering the need for aggressive surgical procedures or lengthy hospital stays. In conclusion, the broadening applications of Anti-VEGF therapeutics in oncology are transforming the landscape of cancer treatment by offering innovative ways to target and combat solid tumors. With ongoing research, clinical trials, and advancements in personalized medicine, Anti-VEGF drugs are set to play a significant role in the future of oncological care, ultimately benefiting patients and healthcare systems alike.

Key Market Challenges

Resistance and treatment failure

Resistance and treatment failure pose significant challenges for Anti-Vascular Endothelial Growth Factor (Anti-VEGF) Therapeutics. Over time, some patients may develop resistance to these drugs, leading to diminished treatment efficacy. The exact mechanisms of resistance are complex and not fully understood, making it difficult to predict and counteract. Additionally, for certain conditions like wet age-related macular degeneration, treatment can be burdensome, requiring frequent injections, which may lead to non-compliance or suboptimal outcomes. Addressing these challenges necessitates ongoing research to identify and develop strategies to overcome resistance, improve patient adherence, and enhance the long-term effectiveness of Anti-VEGF therapies.

Cost and access issues

Cost and access issues are significant challenges for Anti-Vascular Endothelial Growth Factor (Anti-VEGF) Therapeutics. These treatments can be expensive, making them financially burdensome for patients and healthcare systems. The need for regular injections further escalates costs. Limited access to healthcare, insurance coverage

disparities, and high out-of-pocket expenses can restrict patient access to these therapies, particularly in low-income populations. Addressing these challenges involves finding cost-effective solutions, negotiating drug pricing, and expanding access through policy changes or alternative delivery methods to ensure that all patients in need can benefit from Anti-VEGF treatments without financial barriers.

Ocular side effects.

Ocular side effects present a significant challenge for Anti-Vascular Endothelial Growth Factor (Anti-VEGF) Therapeutics, primarily in the treatment of eye conditions. While these drugs effectively target abnormal blood vessel growth, they can lead to adverse ocular effects such as inflammation, increased intraocular pressure, and even potential damage to the retina or cornea. These side effects can be uncomfortable for patients and may necessitate additional treatments to manage them. Striking a balance between therapeutic benefits and minimizing ocular complications is a critical concern, emphasizing the need for ongoing research and drug development to improve the safety and tolerability of Anti-VEGF therapies in ophthalmology.

Long-term safety concerns

Long-term safety concerns are a notable challenge for Anti-Vascular Endothelial Growth Factor (Anti-VEGF) Therapeutics. While these drugs have demonstrated efficacy in various conditions, their extended use raises questions about potential side effects and complications. Prolonged exposure to Anti-VEGF agents, often required in chronic conditions like age-related macular degeneration, can give rise to concerns about the development of adverse effects, including systemic ones like cardiovascular issues. Monitoring the safety and tolerability of Anti-VEGF treatments over extended periods is essential, and ongoing research is needed to comprehensively assess the potential risks and benefits, providing patients and healthcare providers with a clearer understanding of their long-term use.

Key Market Trends

Personalized medicine approaches

Personalized medicine approaches are emerging as a key trend in Anti-Vascular Endothelial Growth Factor (Anti-VEGF) Therapeutics. These approaches leverage genetic and biomarker data to tailor treatment regimens to individual patients. By identifying specific genetic variations or molecular profiles, clinicians can predict patient

responses to Anti-VEGF drugs more accurately. This allows for treatment optimization, potentially reducing adverse effects and enhancing therapeutic outcomes. As genetic testing and precision medicine technologies advance, the use of Anti-VEGF therapeutics can become more targeted and effective, ultimately improving patient care and minimizing the trial-and-error aspect of treatment, which has been a challenge in the past.

Targeted drug delivery methods

Targeted drug delivery methods are becoming a prominent trend in Anti-Vascular Endothelial Growth Factor (Anti-VEGF) Therapeutics. These methods aim to enhance the precision and effectiveness of treatment by directly delivering Anti-VEGF drugs to the affected tissues while minimizing systemic exposure. Nano-carriers, implants, and sustained-release devices are being explored to achieve localized drug delivery. This approach can potentially reduce the frequency of injections, improve patient compliance, and minimize side effects associated with systemic drug distribution. As technology advances and these delivery methods prove their safety and efficacy, they are expected to play a crucial role in the future of Anti-VEGF therapy, offering more efficient and patient-friendly treatment options.

Biosimilars entering the market.

The entry of biosimilars into the market is an emerging trend in Anti-Vascular Endothelial Growth Factor (Anti-VEGF) Therapeutics. Biosimilars are highly similar versions of existing biologic drugs, and they offer cost-effective alternatives to branded Anti-VEGF therapies. As patents for original Anti-VEGF drugs expire, biosimilar competition is increasing, potentially lowering treatment costs and improving accessibility. This trend benefits healthcare systems, insurers, and patients by reducing the financial burden associated with expensive biologics. While maintaining comparable safety and efficacy, biosimilars are expected to play a crucial role in expanding patient access to Anti-VEGF treatments and promoting cost-efficient healthcare delivery in the coming years.

Combination therapies

Combination therapies are emerging as a notable trend in Anti-Vascular Endothelial Growth Factor (Anti-VEGF) Therapeutics. In the pursuit of improved treatment outcomes, researchers and clinicians are exploring the use of Anti-VEGF drugs alongside other therapeutic agents such as chemotherapy, radiation, or

immunotherapies. Combining these approaches can enhance the overall effectiveness of cancer treatment, particularly in addressing solid tumors. By targeting multiple pathways and mechanisms, combination therapies have the potential to achieve synergistic effects, delay disease progression, and potentially increase survival rates. As ongoing research continues to uncover promising combinations, the trend toward integrating Anti-VEGF therapies with other treatments is expected to expand, benefiting patients with complex medical conditions.

Enhanced patient monitoring technologies

Enhanced patient monitoring technologies are a growing trend in Anti-Vascular Endothelial Growth Factor (Anti-VEGF) Therapeutics. These technologies, including telemedicine, wearable devices, and remote monitoring systems, enable real-time tracking of patient health and treatment progress. For conditions like age-related macular degeneration and cancer, timely interventions are crucial. Enhanced monitoring allows healthcare providers to assess treatment response, detect complications, and adjust therapy as needed, improving patient care and outcomes. As these technologies become more sophisticated and accessible, they will play a vital role in optimizing the administration and management of Anti-VEGF treatments, ultimately enhancing the overall quality of patient care in the coming years.

Segmental Insights

Product Insights

Based on the Product, Eylea (aflibercept) has established dominance in the Anti-Vascular Endothelial Growth Factor (Anti-VEGF) therapeutics market due to its exceptional clinical efficacy and dosing convenience. Eylea's effectiveness in treating eye conditions like wet age-related macular degeneration and diabetic macular edema has been well-documented, often resulting in improved visual outcomes for patients. Moreover, its extended dosing interval, requiring fewer injections compared to some competitors, reduces the treatment burden and enhances patient compliance. The combination of proven clinical benefits and a more patient-friendly dosing regimen has made Eylea a preferred choice for both ophthalmologists and individuals seeking effective treatment for these debilitating eye conditions.

End User Insights

Based on End User, Hospitals and clinics dominate the Anti-Vascular Endothelial

Growth Factor (Anti-VEGF) therapeutics market due to several key factors. First, many Anti-VEGF treatments, such as those for eye conditions and cancer, require specialized administration by healthcare professionals, making hospitals and clinics primary points of access. Second, these medical settings are equipped to provide comprehensive diagnostics, treatment planning, and patient monitoring, essential for complex conditions that often necessitate Anti-VEGF therapies. Additionally, hospitals and clinics typically have established relationships with pharmaceutical companies, enabling efficient drug procurement. As a result, these healthcare institutions serve as central hubs for delivering Anti-VEGF treatments and managing patients' therapeutic journeys.

Regional Insights

North America's dominance in the Anti-Vascular Endothelial Growth Factor (Anti-VEGF) therapeutics market can be attributed to its advanced healthcare infrastructure, robust research and development capabilities, and high prevalence of conditions like age-related macular degeneration and various cancers. The region hosts numerous pharmaceutical companies that innovate and produce Anti-VEGF drugs, and it benefits from a strong regulatory framework that expedites drug approvals. Moreover, the North American population's relatively high healthcare expenditure and insurance coverage contribute to increased patient access to these therapies. The combination of these factors positions North America as a leading market for Anti-VEGF treatments, setting the trend for their adoption and development.

Key Market Players

F. Hoffmann-La Roche Ltd

Biogen Inc

Pfizer Inc

Coherus BioSciences Inc

Applied Molecular Genetics Inc

Viartis, Inc

Bausch Health Companies, Inc

Amgen, Inc

Novartis AG

Report Scope:

In this report, the Global Anti-Vascular Endothelial Growth Factor Therapeutics Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Anti-Vascular Endothelial Growth Factor Therapeutics Market, By Product:

Eylea

Lucentis

Beovu

Anti-Vascular Endothelial Growth Factor Therapeutics Market, By Disease:

Macular Edema

Diabetic Retinopathy

Retinal Vein Occlusion

Age-related Macular Degeneration

Anti-Vascular Endothelial Growth Factor Therapeutics Market, By End User:

Hospitals & Clinics

Ambulatory Care centres

Others

Anti-Vascular Endothelial Growth Factor 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 presents in the Anti-Vascular Endothelial Growth Factor Therapeutics Market.

Available Customizations:

Global Anti-Vascular Endothelial Growth Factor 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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