

# **Invasive Fungal Infection Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Disease Type (Candidaemia and Invasive Candidiasis, Intra-abdominal Candidiasis, Cryptococcal Meningitis, Esophageal Candidiasis, Histoplasmosis Acute Pulmonary, Others), by Drug Type (Polyenes, Amphotericin B Deoxycholate, Lipid Formulation Amphotericin B, Others), by region, and Competition**

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## **Abstracts**

Global Invasive Fungal Infection Market has valued at USD 6.99 billion in 2022 and is anticipated to witness an impressive growth in the forecast period with a CAGR of 3.80% through 2028. Invasive fungal infection refers to a serious and potentially life-threatening condition in which fungi, including yeasts and molds, penetrate and invade the tissues and organs of the body. Unlike superficial fungal infections, such as athlete's foot or ringworm, invasive fungal infections are characterized by the ability of the fungi to penetrate deep within the body, often entering the bloodstream and spreading to multiple organs. These infections typically occur in individuals with weakened or compromised immune systems, although they can affect individuals with healthy immune systems under certain circumstances. The primary risk factor for invasive fungal infections is a compromised immune system. This can result from conditions such as HIV/AIDS, cancer (especially hematological malignancies like leukemia and lymphoma), organ transplantation (due to immunosuppressive medications), long-term corticosteroid use, severe burns, and certain autoimmune diseases. Other risk factors include advanced age, malnutrition, and prolonged hospitalization.

Prompt and appropriate antifungal therapy is crucial for managing invasive fungal infections. The choice of antifungal drug depends on the type of fungus causing the infection, its susceptibility to available drugs, and the patient's clinical condition. Common antifungal classes used include azoles, echinocandins, polyenes, and flucytosine. The global aging population is more susceptible to fungal infections due to weakened immune systems and underlying health conditions. As the elderly population grows, so does the demand for antifungal treatments. Improved diagnostic methods, including molecular and biomarker-based tests, have enhanced the early detection of fungal infections. This drives the demand for timely and accurate treatments. Nosocomial (hospital-acquired) fungal infections, including candidemia, are a significant concern. Healthcare facilities are investing in infection control measures and antifungal treatments to mitigate this risk.

## Key Market Drivers

### Advancements in Diagnostics

Molecular techniques, such as polymerase chain reaction (PCR) and nucleic acid amplification, have revolutionized fungal infection diagnosis. These methods allow for the rapid detection and identification of fungal DNA, providing more accurate results than traditional culture methods. Biomarker-based tests, including assays for fungal antigens and antibodies, have been developed to detect specific fungal components in patient samples. Examples include tests for *Aspergillus* galactomannan and  $\beta$ -D-glucan for the diagnosis of invasive aspergillosis and candidiasis, respectively. Next-Generation Sequencing (NGS) technologies enable comprehensive analysis of fungal genomes in clinical samples. They can identify a wide range of fungal species and even detect genetic mutations associated with antifungal resistance. NGS is particularly valuable for cases where traditional methods may struggle to identify the pathogen. Matrix-Assisted Laser Desorption/Ionization Time-of-Flight Mass Spectrometry (MALDI-TOF MS) is a rapid and accurate method for identifying fungal species. It involves analyzing the mass spectrum of microbial proteins, allowing for precise fungal identification.

Advanced imaging technologies, such as computed tomography (CT) and magnetic resonance imaging (MRI), help visualize the extent of fungal infections in affected tissues. These techniques aid in diagnosis and monitoring the progression of infections. Serological tests detect antibodies or antigens produced by the immune system in response to fungal infections. They are useful for diagnosing chronic fungal infections like histoplasmosis and coccidioidomycosis. Rapid diagnostic tests that can be

conducted at the bedside or in clinics have been developed. These tests provide quick results, allowing for timely treatment decisions. Examples include lateral flow assays for candidiasis and aspergillosis. Machine learning algorithms and AI are being applied to analyze complex diagnostic data, aiding in the interpretation of test results, and improving accuracy in identifying fungal pathogens. Innovative biosensors are being developed to detect fungal biomarkers with high sensitivity and specificity. These biosensors can be integrated into portable diagnostic devices for use in resource-limited settings. Companion diagnostic tests are being developed to guide the selection of appropriate antifungal therapies based on the identification of specific fungal strains and their susceptibility to various drugs. Advanced bioinformatics tools and databases have been created to aid in the analysis and interpretation of genomic and proteomic data from fungal pathogens. This supports more precise and rapid identification. This factor will help in the development of the Global Invasive Fungal Infection Market.

### Increasing Hospital-Acquired Infections

Hospitals and healthcare facilities are environments where patients are at an increased risk of fungal infections. Patients in intensive care units (ICUs), those undergoing surgeries, and individuals with catheters or central lines are particularly vulnerable. The prevalence of immunocompromised patients in hospitals further elevates the risk. Fungal infections, including *Candida* bloodstream infections, are often associated with the use of catheters and other medical devices. Catheter-related bloodstream infections (CRBSIs) are a significant concern in healthcare settings, and they often require antifungal treatment. The widespread use of antibiotics in hospitals can disrupt the normal microbial balance in the body, making patients more susceptible to fungal infections. This phenomenon, known as antibiotic-associated candidiasis, contributes to the demand for antifungal therapies. Patients undergoing invasive procedures, surgeries, or organ transplants may require prophylactic antifungal treatment to prevent fungal infections. This is especially true for high-risk procedures, and it drives the demand for antifungal drugs. Prolonged hospitalization can increase the risk of fungal infections, particularly in patients with weakened immune systems. Fungal pathogens can colonize patients during their hospital stay and lead to infections.

Patients in intensive care units (ICUs) are at a higher risk of developing fungal infections due to the severity of their illnesses, the use of invasive devices, and the presence of healthcare-associated pathogens. Hospitals are under constant pressure to implement effective infection control measures to reduce the risk of HAIs. This includes the use of antifungal agents to treat and prevent fungal infections. Improved diagnostic methods, including biomarker-based tests and molecular techniques, enable faster and more

accurate identification of fungal pathogens responsible for HAIs. This leads to timely intervention and treatment. Hospitals are increasingly focused on improving patient outcomes and reducing healthcare-associated complications. Effective management of HAIs, including fungal infections, is a critical component of this effort. Healthcare regulatory bodies and accreditation organizations often have stringent requirements related to infection control and prevention in hospitals. Compliance with these requirements drives the need for antifungal therapies. This factor will pace up the demand of the Global Invasive Fungal Infection Market.

### Increasing Aging Population

Aging is often associated with a natural decline in the immune system's function, known as immunosenescence. This weakening of the immune response makes older individuals more susceptible to infections, including invasive fungal infections. Aging is often accompanied by the presence of chronic medical conditions such as diabetes, cardiovascular disease, and respiratory illnesses. These comorbidities can further weaken the immune system and increase the risk of fungal infections. Older adults may take multiple medications to manage their health conditions, which can lead to drug interactions and adverse effects. Some medications, such as corticosteroids and immunosuppressants, can compromise the immune system and increase susceptibility to fungal infections. Older adults are more likely to reside in long-term care facilities or nursing homes, where the risk of healthcare-associated infections, including fungal infections, is elevated. Older patients often require medical procedures and surgeries for various health issues. These invasive procedures can introduce fungal pathogens and increase the risk of invasive fungal infections. The elderly population may be prescribed antibiotics more frequently, which can disrupt the balance of the body's microbiota and promote the overgrowth of fungal pathogens.

Older adults are more likely to be hospitalized, which increases their exposure to healthcare-associated fungal infections. Prolonged hospital stays can also lead to colonization by fungal pathogens. Older individuals may carry fungal pathogens asymptomatically, increasing the risk of developing invasive fungal infections when their immune systems are compromised. Older adults may present atypical or less severe symptoms of fungal infections, making diagnosis challenging. This can result in delayed treatment, which can have serious consequences. The aging population often requires specialized medical care and treatment, including antifungal therapies, to address the unique challenges associated with managing invasive fungal infections in older individuals. Many countries are experiencing a demographic shift toward an older population, creating a larger patient pool that requires healthcare services and

antifungal treatments. The increased vulnerability of older adults to invasive fungal infections has drawn attention from public health organizations, leading to a focus on prevention, early diagnosis, and appropriate treatment. This factor will accelerate the demand of the Global Invasive Fungal Infection Market.

## Key Market Challenges

### Antifungal Resistance

Fungal pathogens, particularly *Candida* and *Aspergillus* species, have demonstrated the ability to develop resistance to commonly used antifungal drugs. This emergence of resistant strains can render previously effective treatments ineffective. There is a finite number of antifungal drug classes available for treating invasive fungal infections. When resistance develops to one or more drug classes within these limited options, healthcare providers face a therapeutic dilemma with fewer effective treatments to choose from. Invasive fungal infections, such as invasive candidiasis and aspergillosis, are associated with high mortality rates, especially in immunocompromised patients. Antifungal resistance can further exacerbate the risk of treatment failure and poor outcomes. Antifungal resistance can lead to prolonged hospitalizations, increased healthcare costs, and the need for more aggressive treatments. Patients may require longer periods of intensive care, adding to the overall burden on healthcare systems. Some invasive fungal infections, such as chronic pulmonary aspergillosis or fungal sinusitis, can become chronic and difficult to eradicate, especially in the presence of antifungal resistance. This may require long-term or combination therapy. In some cases, resistance to one antifungal drug can lead to cross-resistance with others in the same drug class, further limiting treatment options. The management of antifungal-resistant infections often involves the use of more expensive and less accessible antifungal drugs. This can significantly increase the overall cost of care for affected patients. Fungal resistance can be influenced by environmental factors, including agricultural practices and the use of antifungal agents in other industries. This makes resistance a complex and multifactorial issue.

### Immunocompromised Patients

Immunocompromised individuals, such as those with HIV/AIDS, cancer undergoing chemotherapy, organ transplant recipients, and patients on immunosuppressive medications, are more susceptible to invasive fungal infections. Their weakened immune systems make them particularly vulnerable to fungal pathogens. The growing population of immunocompromised patients, due to factors like aging and the increasing



prevalence of chronic diseases, has led to a higher incidence of invasive fungal infections. This higher incidence drives the demand for antifungal treatments. In immunocompromised patients, invasive fungal infections tend to be more severe and can progress rapidly. They often result in higher morbidity and mortality rates, making early and effective treatment crucial. Diagnosing fungal infections in immunocompromised individuals can be challenging. Their atypical clinical presentations and the need for more sensitive diagnostic methods contribute to diagnostic difficulties.

Some antifungal drugs may be less effective or more toxic in immunocompromised patients due to their compromised immune systems. This limits the choice of antifungal therapies and may require individualized treatment plans. Immunocompromised patients often require multiple medications to manage their underlying conditions. Drug interactions between antifungal agents and other medications must be carefully considered to avoid adverse effects. In certain cases, immunocompromised patients may receive prophylactic antifungal therapy to prevent fungal infections. The widespread use of prophylaxis has implications for the selection of antifungal drugs and the emergence of resistance. Immunocompromised patients may require prolonged courses of antifungal treatment, making adherence to therapy and monitoring for potential side effects critical. Managing invasive fungal infections in immunocompromised patients can be costly due to extended hospital stays, specialized care, and the use of expensive antifungal drugs. Immunocompromised patients are at a higher risk of recurrent fungal infections. This necessitates ongoing surveillance, follow-up, and potential long-term antifungal therapy.

## Key Market Trends

### Preventive Measures

Prophylactic administration of antifungal drugs is increasingly employed in high-risk patient groups, such as those undergoing stem cell or solid organ transplantation and patients with hematological malignancies. Antifungal prophylaxis helps prevent fungal infections during periods of vulnerability. Healthcare organizations and professional societies have developed guidelines and recommendations for the appropriate use of antifungal prophylaxis and treatment. Adhering to these guidelines has become a standard practice to reduce the risk of invasive fungal infections. Hospitals and healthcare facilities are implementing stringent infection control measures to minimize the risk of healthcare-associated fungal infections. These practices include hand hygiene, environmental cleaning, and isolation precautions. Enhanced surveillance

systems and screening protocols are in place to monitor and identify patients at risk of invasive fungal infections. Early identification allows for timely intervention and treatment. Advanced diagnostic methods, such as biomarker-based tests and molecular techniques, enable rapid and accurate identification of fungal pathogens. Early diagnosis is crucial for initiating appropriate antifungal therapy and preventing disease progression. Educating patients and their caregivers about the risks of invasive fungal infections and preventive measures, such as good hygiene and adherence to prescribed medications, is an essential component of infection prevention. Antifungal stewardship programs are being implemented in healthcare settings to ensure the appropriate and judicious use of antifungal drugs. These programs aim to prevent resistance and minimize side effects.

## Segmental Insights

### Disease Type Insights

In 2022, the Global Invasive Fungal Infection Market largest share was held by Candidaemia and Invasive Candidiasis segment and is predicted to continue expanding over the coming years. Candidemia and invasive candidiasis are among the most common forms of invasive fungal infections worldwide. Candida species are opportunistic pathogens that can cause serious bloodstream infections, especially in immunocompromised individuals and those in healthcare settings. The high incidence of these infections contributes to the market's prominence. Candidemia and invasive candidiasis can lead to life-threatening conditions, making their treatment a top priority in healthcare. These infections often require hospitalization, intensive care, and potent antifungal therapy, driving demand for effective treatments. The growing population of immunocompromised patients, such as those undergoing chemotherapy, organ transplant recipients, and individuals with HIV/AIDS, is at a heightened risk of Candida infections. As these patient populations increase, so does the need for treatment options. Candida species are often responsible for healthcare-associated infections, including catheter-related bloodstream infections. Hospitals and healthcare facilities prioritize infection control and antifungal treatments, further driving demand for therapies in this segment.

### Drug Type Insights

In 2022, the Global Invasive Fungal Infection Market largest share was held by Amphotericin B segment and is predicted to continue expanding over the coming years. Amphotericin B is a broad-spectrum antifungal drug that is effective against a wide

range of fungal pathogens, including many species of *Candida*, *Aspergillus*, and other invasive fungi. Its versatility in treating various fungal infections makes it a preferred choice in many clinical situations. Amphotericin B has been in clinical use for decades and has established a strong track record for its efficacy in treating invasive fungal infections. Its long history of use has built trust among healthcare providers.

Amphotericin B is often reserved for the treatment of severe and life-threatening fungal infections, such as invasive candidiasis and invasive aspergillosis. In such cases, its potent antifungal activity is crucial in managing these critical conditions. Unlike some other antifungal drugs, resistance to Amphotericin B is relatively rare. This makes it a dependable option when dealing with fungal infections, especially in cases where resistance to other antifungal agents may be a concern. In some cases, Amphotericin B is used in combination with other antifungal drugs to enhance treatment efficacy. This combination therapy approach further supports its market presence.

## Regional Insights

The North America region dominates the Global Invasive Fungal Infection Market in 2022. North America, particularly the United States and Canada, boasts a highly developed healthcare infrastructure. This includes well-established healthcare facilities, advanced diagnostic capabilities, and a strong pharmaceutical industry, all of which contribute to the effective management and treatment of invasive fungal infections. The region has a relatively high prevalence of risk factors for invasive fungal infections. These risk factors include a large aging population, a high number of immunocompromised individuals (such as cancer patients and organ transplant recipients), and a substantial use of immunosuppressive drugs. These factors increase the likelihood of fungal infections and drive the demand for antifungal treatments. North America is a hub for pharmaceutical research and development. Many pharmaceutical companies and research institutions in the region are actively involved in developing new antifungal drugs and therapies. The presence of a robust research ecosystem fosters innovation and drives advancements in the field of fungal infection treatment. The United States has a well-defined regulatory framework for drug approvals through the U.S. Food and Drug Administration (FDA). The FDA's rigorous evaluation process ensures that new antifungal drugs are thoroughly tested and approved for use, which can encourage their adoption in clinical practice.

## Key Market Players

Cidara Therapeutics, Inc.



Basilea Pharmaceutica AG Allschwil

Pfizer Inc.

GlaxoSmith Kline

Bayer AG

Abbott Laboratories Ltd.

Merck & Co, Inc.

Astellas Pharma Inc.

Scynexis Inc.

Matinas BioPharma Holdings, Inc

Report Scope:

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

Invasive Fungal Infection Market, By Disease Type:

Candidaemia and Invasive Candidiasis

Intra-abdominal Candidiasis

Cryptococcal Meningitis

Esophageal Candidiasis

Histoplasmosis Acute Pulmonary

Others

Invasive Fungal Infection Market, By Drug Type:

Polyenes

Amphotericin B Deoxycholate

Lipid Formulation Amphotericin B

Others

Invasive Fungal Infection Market, By region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

South Korea

Australia

Japan

Europe

Germany

France

United Kingdom

Spain

Italy

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 Global Invasive Fungal Infection Market.

## Available Customizations:

Global Invasive Fungal Infection 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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