

Japan Pulmonary Arterial Hypertension Drugs Market, By Drug Class (Endothelin Receptor Antagonists (ERAs), Phosphodiesterase-5 (PDE-5) Inhibitors, Soluble Guanylate Cyclase (sGC) Stimulators, Prostacyclin Analogues, Calcium Channel Blockers, Others), By Route of Administration (Oral, Inhalation, Intravenous, Subcutaneous), By Distribution Channel (Hospital Pharmacies, Retail Pharmacies, Online Pharmacies), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Japan Pulmonary Arterial Hypertension Drugs Market was valued at USD 230.11 million in 2024 and is anticipated to project steady growth in the forecast period with a CAGR of 5.38% through 2030. The Japan Pulmonary Arterial Hypertension (PAH) Drugs Market is a dynamic sector marked by continuous evolution, primarily driven by therapeutic advancements, rising disease prevalence, and favorable healthcare policies. The market has demonstrated steady growth due to an increasing number of PAH cases and significant progress in drug development.

Key drivers include heightened awareness, enhanced diagnostic tools, and the introduction of novel therapies. The market expansion is underpinned by growing demand for effective treatments and sustained investment in pharmaceutical research and development. Regulatory support, including expedited drug approvals, further contributes to market growth by facilitating the availability of new therapies.

Challenges such as high treatment costs and variable disease awareness persist, yet the market remains promising. The focus on personalized medicine and substantial R&D investment is expected to influence future growth, leading to improved patient outcomes and a broader range of available PAH treatments.

Key Market Drivers

Advancements in Medical Research and Drug Development

Advancements in medical research and drug development are pivotal drivers of growth in the Japan Pulmonary Arterial Hypertension (PAH) Drugs Market. These advancements lead to the creation of more effective treatments, improved patient outcomes, and a broader range of therapeutic options. The key aspects of how these advancements drive market growth include innovation in therapeutic targets, enhancement of drug efficacy and safety, development of combination therapies, and acceleration of drug approval processes.

Medical research has led to a deeper understanding of the pathophysiology of PAH, identifying new molecular and genetic targets for therapy. This has resulted in the development of novel drug classes such as soluble guanylate cyclase (sGC) stimulators and selective prostacyclin receptor agonists. These innovative treatments offer mechanisms of action that specifically address the underlying causes of PAH, providing more effective and targeted interventions. The introduction of these new therapies expands the treatment landscape, offering hope to patients who may not respond adequately to existing medications. Ongoing research efforts aim to enhance the efficacy and safety profiles of PAH drugs. Pharmaceutical companies invest in refining existing drugs to improve their therapeutic outcomes and reduce adverse effects. For instance, advancements in endothelin receptor antagonists (ERAs) and phosphodiesterase-5 (PDE-5) inhibitors have led to formulations with better tolerability and higher potency. Improved drug formulations ensure that patients receive maximum benefit with minimal side effects, leading to higher patient adherence and satisfaction. This, in turn, drives the demand for these advanced therapies in the market.

Combination therapy has emerged as a crucial strategy in PAH treatment, driven by research demonstrating that combining drugs with different mechanisms of action can provide synergistic benefits. Medical research supports the use of combination therapies to achieve better control of PAH symptoms and slow disease progression. For example, combining an ERA with a PDE-5 inhibitor or a prostacyclin analogue can enhance the therapeutic effects compared to monotherapy. The development and

approval of fixed-dose combination drugs further simplify treatment regimens, improving patient adherence and outcomes. The success of combination therapies fosters market growth by offering more comprehensive treatment options. Advancements in medical research also streamline the drug development and approval processes. Enhanced clinical trial designs, biomarker-driven studies, and adaptive trial methodologies accelerate the evaluation of new drugs. Regulatory bodies in Japan, such as the Pharmaceuticals and Medical Devices Agency (PMDA), are increasingly adopting expedited review pathways for innovative and orphan drugs, including those for PAH. Faster approval timelines ensure that cutting-edge therapies reach the market more quickly, benefiting patients and driving market growth. Additionally, collaboration between regulatory agencies and pharmaceutical companies facilitates the efficient development and approval of new treatments.

The focus on PAH research has attracted significant investment from both the public and private sectors. Government funding, grants, and subsidies support research initiatives aimed at discovering new treatments and improving existing ones. Pharmaceutical companies are also dedicating substantial resources to PAH drug development, driven by the potential for significant market opportunities. Increased investment accelerates the pace of innovation, leading to a steady pipeline of new therapies entering the market. The advent of personalized medicine has revolutionized the approach to PAH treatment. Research efforts are increasingly focused on identifying genetic, molecular, and clinical markers that can predict individual patient responses to specific therapies. Personalized treatment plans based on these markers ensure that patients receive the most appropriate and effective therapies for their condition. The move towards precision medicine enhances treatment outcomes and reduces trial-and-error approaches, driving patient satisfaction and market growth.

Increasing Prevalence of Pulmonary Arterial Hypertension (PAH)

The increasing prevalence of Pulmonary Arterial Hypertension (PAH) significantly drives the growth of the Japan Pulmonary Arterial Hypertension (PAH) Drugs Market by expanding the patient base, increasing demand for effective treatments, and prompting investments in drug development and healthcare infrastructure. From April 2008 to September 2020, data from Japan's Medical Data Vision database was analyzed to assess prevalence, incidence, patient characteristics, treatment patterns, and the use of vasodilators by treatment line for Pulmonary Arterial Hypertension (PAH). The analysis revealed a prevalence rate of 0.392% among patients with Systemic Lupus Erythematosus (SLE). This trend encompasses several key factors that collectively contribute to market growth: The prevalence of PAH in Japan is on the rise, driven by

factors such as an aging population and an increase in conditions that are associated with PAH. As the population ages, the incidence of PAH, which is more common in older adults, also increases. Additionally, the growing number of patients with connective tissue diseases, such as scleroderma and systemic lupus erythematosus, which are known risk factors for PAH, further contributes to the higher prevalence. This growing patient population directly drives the demand for PAH drugs as more individuals require treatment. Advancements in diagnostic technologies and increased awareness among healthcare providers have led to more accurate and earlier detection of PAH. Improved imaging techniques, such as high-resolution echocardiography and advanced pulmonary function tests, enable more precise diagnosis of PAH at earlier stages. Early diagnosis leads to earlier intervention, increasing the number of patients being treated and consequently driving demand for PAH medications. The enhanced diagnostic capabilities not only contribute to more effective management of the disease but also increase the overall market size by identifying more patients who need treatment.

Efforts to raise public awareness and educate both patients and healthcare providers about PAH have led to a higher recognition of symptoms and an increased likelihood of seeking medical care. Awareness campaigns and educational initiatives have improved understanding of the disease, leading to more people being tested and diagnosed. As a result, the diagnosed patient pool expands, creating a greater market for PAH drugs. Increased awareness also encourages patients to seek treatment sooner, contributing to more effective disease management and an increased demand for pharmaceuticals. The rising prevalence of PAH has led to a heightened focus on disease management and the development of comprehensive treatment strategies. Healthcare systems and pharmaceutical companies are increasingly prioritizing PAH as a significant therapeutic area. This focus is reflected in the development of new treatment guidelines, investment in research and development for novel therapies, and the implementation of patient support programs. The increased emphasis on managing PAH effectively drives the demand for a wide range of drugs and therapeutic options, thereby expanding the market.

The economic burden of PAH on healthcare systems and the broader economy also drives market growth. PAH is a chronic condition that requires long-term treatment and regular medical care, leading to substantial healthcare costs. As the prevalence of PAH increases, the associated costs also rise, prompting both public and private sectors to invest in more effective treatments. The economic impact of PAH drives efforts to find innovative and cost-effective solutions, including the development of new drugs and therapies, which in turn stimulates market growth. In response to the rising prevalence

of PAH, government and healthcare institutions are implementing policies and programs aimed at improving disease management and access to treatment. This support includes funding for research, subsidies for drug development, and initiatives to improve patient access to medications. Such institutional support fosters an environment conducive to market growth by facilitating the development and availability of new PAH therapies. The increasing prevalence of PAH has prompted pharmaceutical companies to focus on this growing market segment. Companies are investing in research to develop new and improved PAH treatments, driven by the large and expanding patient population. The potential for significant market share and revenue growth motivates pharmaceutical companies to innovate and bring new therapies to market, further driving market expansion.

Rising Awareness and Diagnosis Rates

Rising awareness and diagnosis rates significantly drive the growth of the Japan Pulmonary Arterial Hypertension (PAH) Drugs Market by enhancing early detection, increasing patient engagement, expanding the target population, and fostering market dynamics. These factors collectively contribute to a more robust demand for PAH therapies and a more dynamic market landscape. Increased awareness about PAH among healthcare providers and the general public leads to earlier and more accurate detection of the disease. Improved understanding of PAH symptoms—such as shortness of breath, fatigue, and chest pain—encourages individuals to seek medical attention sooner. Advanced diagnostic tools and techniques, such as high-resolution echocardiography and pulmonary function tests, facilitate early diagnosis. Early detection allows for timely intervention and treatment, improving patient outcomes and reducing disease progression. This leads to a higher number of diagnosed cases, subsequently driving demand for PAH drugs as more patients are identified and treated. Rising awareness and education about PAH enhance patient engagement and proactive management of the condition. Public health campaigns, educational programs, and awareness initiatives have made patients more informed about PAH and its treatments. As patients become more knowledgeable about their condition, they are more likely to actively participate in their treatment plans and adhere to prescribed therapies. This increased patient engagement leads to higher utilization of PAH drugs and a greater market demand for effective treatment options.

As awareness about PAH grows, more individuals who might otherwise have remained undiagnosed are being identified. This expanded target population includes patients who are newly diagnosed or those with previously misdiagnosed conditions. The increased number of diagnosed PAH patients directly translates into a larger market for

PAH drugs. Pharmaceutical companies and healthcare providers recognize this growing patient base, leading to increased investment in drug development and marketing efforts aimed at addressing the needs of a broader patient population. The rise in diagnosis rates stimulates market dynamics by creating opportunities for pharmaceutical companies to introduce and promote new PAH therapies. As the number of diagnosed patients increases, there is a greater need for diverse treatment options to cater to different stages and types of PAH. This drives innovation and competition within the market, encouraging the development of new drugs and treatment modalities. Increased market competition can lead to improved treatment options, better patient outcomes, and more competitive pricing, further stimulating market growth.

With greater awareness and earlier diagnosis, patients are more likely to start and adhere to prescribed treatments. Early intervention helps in managing PAH more effectively, reducing symptoms, and improving quality of life. As patients experience the benefits of timely and effective treatment, adherence to medication regimens improves. Higher adherence rates lead to more consistent use of PAH drugs and a sustained demand for these therapies, contributing to market growth. Rising awareness and diagnosis rates often lead to increased support from government and healthcare institutions. Governments may implement policies and programs to enhance disease management, subsidize treatment costs, and improve access to medications. Healthcare systems may invest in training programs for healthcare providers to recognize and diagnose PAH more effectively. Such support helps in expanding the reach of PAH therapies and addressing the needs of a growing patient population, thereby driving market growth. The increased prevalence of diagnosed PAH cases stimulates pharmaceutical companies to invest more in research and development for new and improved PAH treatments. As the market for PAH drugs expands due to rising awareness and diagnosis rates, there is a greater incentive for companies to innovate and develop novel therapies. This investment in R&D leads to the introduction of advanced treatment options, further fueling market growth.

Key Market Challenges

High Treatment Costs

The cost of PAH treatments remains a significant barrier to market growth. PAH therapies, including endothelin receptor antagonists (ERAs), phosphodiesterase-5 (PDE-5) inhibitors, and prostacyclin analogues, are often expensive. The high costs are attributed to the complex nature of drug development, manufacturing processes, and

the need for ongoing research and clinical trials. These expenses are further compounded by the chronic nature of PAH, requiring long-term treatment and continuous medication. For many patients, the financial burden can be overwhelming, even with insurance coverage and government subsidies. The high treatment costs limit the affordability and accessibility of these drugs, thereby restricting market growth.

Limited Awareness and Early Diagnosis

Awareness and early diagnosis of PAH remain significant challenges. PAH is a rare and complex condition, often leading to delayed diagnosis and treatment. Symptoms such as shortness of breath, fatigue, and chest pain are nonspecific and can be mistaken for other more common conditions like asthma or chronic obstructive pulmonary disease (COPD). This misdiagnosis or delayed diagnosis means that many patients do not receive timely and appropriate treatment, which can exacerbate the disease progression. Limited awareness among both healthcare providers and the general public contributes to this issue. Increasing awareness and improving early diagnostic capabilities are crucial for timely intervention, but the current gaps in this area pose a challenge to market growth.

Complexity of Regulatory Approvals

Navigating the regulatory landscape for PAH drugs in Japan is complex and time-consuming. The stringent requirements for demonstrating safety, efficacy, and quality of new therapies necessitate extensive clinical trials and comprehensive documentation. The approval process for new drugs or new indications for existing drugs can be lengthy, delaying the entry of innovative treatments into the market. Additionally, post-marketing surveillance and pharmacovigilance requirements add to the regulatory burden. For pharmaceutical companies, these challenges translate into higher costs and longer timelines for bringing new PAH therapies to market. The regulatory complexity can deter investment and innovation, restricting the growth of the PAH drugs market.

Key Market Trends

Advancements in Drug Development and Precision Medicine:

The landscape of PAH treatment is evolving with significant advancements in drug development and the application of precision medicine. Researchers are focusing on novel therapeutic targets and innovative drug formulations that offer improved efficacy

and safety profiles. For instance, the development of new endothelin receptor antagonists (ERAs), phosphodiesterase-5 (PDE-5) inhibitors, and soluble guanylate cyclase (sGC) stimulators is expanding the arsenal of available treatments. Additionally, precision medicine approaches are enabling personalized treatment plans tailored to the genetic and molecular characteristics of individual patients. This trend ensures that patients receive the most effective therapies, minimizing adverse effects and optimizing outcomes. The adoption of precision medicine is expected to drive higher demand for advanced PAH drugs, fostering market growth.

Increased Focus on Patient-Centric Care

The healthcare industry is increasingly emphasizing patient-centric care, which prioritizes the needs, preferences, and experiences of patients. This trend is particularly relevant in the PAH market, where managing the disease requires a comprehensive and individualized approach. Pharmaceutical companies and healthcare providers are investing in patient support programs that offer education, counseling, and adherence assistance. These programs aim to improve patient engagement, adherence to prescribed treatments, and overall quality of life. Furthermore, the development of user-friendly drug delivery systems, such as inhalers and oral formulations, enhances patient convenience and compliance. The shift towards patient-centric care is likely to result in better patient outcomes and increased demand for PAH medications, driving market growth.

Integration of Digital Health Technologies

The integration of digital health technologies is revolutionizing the management of chronic diseases like PAH. Digital health tools, including telemedicine, mobile health apps, and wearable devices, are enabling remote monitoring, real-time data collection, and personalized health insights. These technologies allow healthcare providers to track patients' symptoms, treatment adherence, and response to therapy more effectively. For PAH patients, continuous monitoring of vital signs and exercise tolerance can provide valuable information for adjusting treatment plans and preventing complications. Telemedicine platforms also facilitate timely consultations and follow-ups, reducing the need for frequent hospital visits. The adoption of digital health solutions enhances the overall efficiency of PAH management, improves patient outcomes, and is expected to drive the demand for advanced PAH therapies.

Segmental Insights

Drug Class Insights

Based on the category of Drug Class, the Endothelin Receptor Antagonists (ERAs) segment emerged as the dominant in the market for Japan Pulmonary Arterial Hypertension Drugs in 2024. ERAs, such as bosentan and ambrisentan, have demonstrated considerable effectiveness in managing PAH. These drugs work by blocking the endothelin receptors, which play a crucial role in vasoconstriction and proliferation of the vascular smooth muscle cells. By inhibiting these receptors, ERAs help to relax blood vessels and reduce blood pressure in the lungs, improving overall heart function and patient quality of life. The robust clinical data supporting their efficacy and safety makes ERAs a preferred choice among healthcare providers.

ERAs have been a cornerstone of PAH treatment for many years. Their long-standing use and proven track record have ingrained them into standard treatment guidelines. The familiarity and confidence that healthcare professionals have in prescribing ERAs contribute to their widespread use. Additionally, their inclusion in national and international treatment guidelines reinforces their dominance in the market. ERAs are suitable for a wide range of PAH patients, including those with idiopathic PAH and PAH associated with connective tissue diseases. This broad applicability allows for a larger patient population to benefit from ERA therapy. Furthermore, many ERAs are available in oral formulations, enhancing patient adherence and convenience compared to other treatments that might require intravenous or inhalation routes. The Japanese healthcare system's supportive policies and reimbursement schemes significantly impact the accessibility and affordability of PAH medications. ERAs, being well-established drugs, often receive favorable reimbursement status, making them more accessible to patients. Government initiatives aimed at managing chronic diseases and improving patient outcomes further support the widespread use of ERAs.

Continuous R&D efforts in improving ERA formulations and exploring combination therapies also contribute to the segment's dominance. Pharmaceutical companies invest in optimizing the efficacy and safety profiles of ERAs, as well as developing new compounds with better therapeutic outcomes. This ongoing innovation ensures that ERAs remain at the forefront of PAH treatment options. ERAs benefit from strong market penetration due to the presence of leading pharmaceutical companies that prioritize their production and distribution. These companies have established robust supply chains and distribution networks that ensure the availability of ERAs across healthcare facilities in Japan. The competitive landscape also encourages continuous improvement and cost-efficiency, benefiting the overall market. These factors collectively contribute to the growth of this segment.

Regional Insights

Kanto emerged as the dominated in the Japan Pulmonary Arterial Hypertension Drugs market in 2024, holding the largest market share in terms of value. The Kanto Region's dominance in the Japan Pulmonary Arterial Hypertension (PAH) Drugs Market can be attributed to several critical factors that collectively create a conducive environment for market growth. These factors include the region's advanced healthcare infrastructure, high concentration of specialized medical facilities, substantial patient population, and strong presence of leading pharmaceutical companies. Kanto is home to some of Japan's most advanced healthcare facilities, including top-tier hospitals and research institutions. These facilities are equipped with state-of-the-art medical technology and highly skilled healthcare professionals, enabling the effective diagnosis and treatment of complex conditions such as PAH. The availability of advanced diagnostic tools and treatment options attracts a significant number of patients from across the country, thereby driving demand for PAH drugs in the region.

The region boasts a high concentration of specialized medical centers that focus on cardiovascular and pulmonary diseases. These centers are often involved in cutting-edge research and clinical trials for new PAH therapies. The presence of such specialized facilities ensures that patients have access to the latest treatment protocols and innovative drug therapies, further boosting the demand for PAH drugs. Kanto, which includes Tokyo and Yokohama, is the most populous region in Japan. The large and diverse population results in a higher incidence of various health conditions, including PAH. The region's demographic profile, characterized by a significant aging population, also contributes to the higher prevalence of PAH, as the condition is more common in older adults. This substantial patient base drives the demand for effective PAH treatment options.

Kanto is a hub for leading pharmaceutical companies and biotech firms, many of which are involved in the development and commercialization of PAH drugs. The proximity of these companies to major healthcare facilities and research institutions facilitates collaborations and accelerates the development of new therapies. Additionally, these companies often have robust distribution networks that ensure the widespread availability of PAH drugs across the region. The region benefits from significant investments in medical research and development, particularly in the field of cardiovascular and pulmonary diseases. These investments support ongoing clinical trials, the discovery of novel drug candidates, and the refinement of existing therapies. The strong focus on R&D in Kanto ensures that patients have access to the most

advanced and effective PAH treatments available.

Key Market Players

GSK PLC

Teva Pharmaceutical Industries Ltd.

United Therapeutics Corporation

Dr. Reddy's Laboratories Ltd.

Sandoz Group AG

NATCO Pharma Limited

Zydus Pharmaceuticals, Inc

Hikma Pharmaceuticals PLC

Viartis Inc

Sun Pharmaceutical Industries Ltd

Report Scope:

In this report, the Japan Pulmonary Arterial Hypertension Drugs Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Japan Pulmonary Arterial Hypertension Drugs Market, By Drug Class:

Endothelin Receptor Antagonists (ERAs)

Phosphodiesterase-5 (PDE-5) Inhibitors

Soluble Guanylate Cyclase (sGC) Stimulators

Prostacyclin Analogues

Calcium Channel Blockers

Others

Japan Pulmonary Arterial Hypertension Drugs Market, By Route of Administration:

Oral

Inhalation

Intravenous

Subcutaneous

Japan Pulmonary Arterial Hypertension Drugs Market, By Distribution Channel:

Hospital Pharmacies

Retail Pharmacies

Online Pharmacies

Japan Pulmonary Arterial Hypertension Drugs Market, By Region:

Hokkaido

Tohoku

Kanto

Chubu

Kansai

Chugoku

Shikoku

Kyushu

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Japan Pulmonary Arterial Hypertension Drugs Market.

Available Customizations:

Japan Pulmonary Arterial Hypertension Drugs market report with the given market data, TechSci 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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