

Non-Alcoholic Steatohepatitis Treatment Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Drug Type (Vitamin E and Pioglitazone, Obeticholic Acid (OCA), Lanifibranor, Semaglutide, Resmetirom, Aramchol, Cenicriviroc, Others), By End-User (Hospital Pharmacies, Retail and Specialty Pharmacies, Others), By Region & Competition, 2019-2029F

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Abstracts

Global Non-Alcoholic Steatohepatitis Treatment Market valued at USD 1.15 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 39.30% through 2029. Non-Alcoholic Steatohepatitis Treatment is to prevent the progression of the disease and to reduce the associated liver inflammation and damage. NASH is a more advanced form of non-alcoholic fatty liver disease (NAFLD), characterized by inflammation and liver cell injury. If left untreated, NASH can lead to more serious liver conditions, such as fibrosis (scarring), cirrhosis (advanced scarring), and even liver failure. Additionally, NASH increases the risk of other complications like cardiovascular disease and diabetes, and increased awareness of the health benefits associated with Non-Alcoholic Steatohepatitis Treatment are expected to positively influence the global market growth.

The primary aim of NASH treatment is to reduce the inflammation and injury occurring in the liver. This helps to slow down or halt the progression of the disease to more severe stages, such as fibrosis and cirrhosis. Fibrosis is the accumulation of scar tissue in the liver, and cirrhosis is the advanced stage of scarring. NASH treatment aims to prevent or minimize the development of fibrosis and cirrhosis, as these conditions can

lead to significant liver dysfunction and complications. Many individuals with NASH also have insulin resistance and are at risk of developing type 2 diabetes. NASH treatment often includes interventions to improve insulin sensitivity, which can help reduce liver inflammation and the accumulation of fat in the liver. Weight loss is a key component of NASH treatment, especially in individuals who are overweight or obese. Losing excess weight can lead to improvements in liver health, insulin sensitivity, and overall metabolic function. NASH is closely associated with obesity, metabolic syndrome, and related conditions like type 2 diabetes and dyslipidaemia. NASH treatment involves managing these underlying risk factors to improve overall health and reduce the impact on the liver.

Key Market Drivers

Rising Prevalence of Non-Alcoholic Steatohepatitis (NASH)

The rising prevalence of Non-Alcoholic Steatohepatitis (NASH) directly contributes to the growth of the global NASH treatment market. NASH is a progressive liver disease characterized by inflammation and liver cell damage, often associated with obesity, insulin resistance, and metabolic syndrome. As the prevalence of NASH increases, the number of individuals diagnosed with the condition also rises. This larger patient population creates a greater demand for effective treatments and therapies to manage the disease. With greater awareness and understanding of NASH among both healthcare professionals and the general population, more cases are being diagnosed. Improved diagnostic methods and guidelines have contributed to earlier and more accurate detection of NASH, leading to increased demand for treatment options. The economic burden of NASH on healthcare systems is substantial due to its potential to progress to advanced liver conditions like fibrosis, cirrhosis, and hepatocellular carcinoma. This drives healthcare providers, governments, and patients to invest in appropriate treatment strategies to prevent disease progression and associated complications.

NASH can lead to a reduced quality of life due to symptoms like fatigue, discomfort, and the psychological impact of a chronic liver condition. Patients are motivated to seek treatment to improve their overall well-being and maintain a higher quality of life. Efforts to increase awareness about NASH, its risk factors, and its potential consequences have led to more individuals seeking medical attention and treatment options. This growing awareness is a key driver behind the increasing prevalence of NASH cases. The global rise in obesity rates and the prevalence of metabolic syndrome, which includes factors like insulin resistance and dyslipidaemia, directly contribute to the

increased risk of developing NASH. As these conditions become more common, so does the incidence of NASH.

Lifestyle Changes and Obesity Epidemic

Lifestyle changes and the obesity epidemic play a significant role in driving the growth of the global Non-Alcoholic Steatohepatitis (NASH) treatment market. NASH is closely linked to obesity, insulin resistance, and metabolic syndrome, and the increasing prevalence of these conditions has a direct impact on the demand for NASH treatments. Obesity is a major risk factor for the development of NASH. As the global obesity epidemic continues, more individuals are at a higher risk of developing NASH due to the accumulation of fat in the liver and associated metabolic disturbances. Metabolic syndrome, a cluster of conditions including obesity, high blood pressure, high blood sugar, and abnormal cholesterol levels, is closely linked to NASH. The rising prevalence of metabolic syndrome contributes to the growing incidence of NASH cases. Obesity and sedentary lifestyles are associated with insulin resistance, a condition where the body's cells do not respond effectively to insulin. Insulin resistance is a key factor in the development of NASH, and its prevalence drives the demand for treatments.

Lifestyle changes, including diet modifications and increased physical activity, are crucial components of NASH treatment. As more individuals become aware of the connection between their lifestyle habits and NASH risk, there is a growing demand for interventions that can help manage the condition through lifestyle changes. Weight loss is a primary goal in NASH treatment, as shedding excess weight can lead to improvements in liver health and metabolic function. The obesity epidemic highlights the need for weight management strategies, both as prevention and treatment for NASH. Efforts to address the obesity epidemic and promote healthier lifestyles contribute to increased awareness about NASH and its potential consequences. Public health campaigns aimed at reducing obesity often indirectly contribute to greater awareness of related conditions like NASH.

Increasing Healthcare Expenditure

Increasing healthcare expenditure plays a key role in driving the growth of the global Non-Alcoholic Steatohepatitis (NASH) treatment market. NASH is a progressive liver disease associated with obesity, insulin resistance, and metabolic syndrome. As healthcare expenditures rise, there is a greater focus on addressing chronic diseases like NASH, which require ongoing medical management and treatment. With rising healthcare expenditures, healthcare providers and policymakers recognize the

economic and healthcare burden posed by chronic diseases like NASH. This recognition drives the need for investment in research, diagnostics, treatments, and interventions. Increased healthcare spending often leads to improved diagnostic capabilities and greater access to screenings for diseases like NASH. This results in more accurate and earlier detection of NASH cases, driving the demand for appropriate treatment options. Investments in advanced diagnostic technologies, such as imaging techniques and blood tests, enable healthcare professionals to better identify and monitor NASH patients. Accurate diagnosis is crucial for tailoring effective treatment plans. Higher healthcare expenditures can support public health campaigns and patient education initiatives focused on NASH. Increased awareness about the disease encourages individuals to seek medical attention and treatment, contributing to market growth.

Greater healthcare funding can support research efforts to understand the underlying mechanisms of NASH and develop innovative treatments. Pharmaceutical companies receive more financial support for conducting clinical trials and developing new therapies. Increased healthcare spending can lead to improved access to healthcare services, medications, and treatments, making NASH treatments more available and accessible to patients in need. Expanding healthcare infrastructure can facilitate the management of chronic diseases like NASH. This includes the availability of specialized clinics, medical professionals, and resources dedicated to NASH diagnosis and treatment.

Key Market Challenges

Limited Understanding of Disease Mechanisms

The limited understanding of disease mechanisms poses a significant challenge for the global Non-Alcoholic Steatohepatitis (NASH) treatment market. NASH is a complex liver disease characterized by inflammation and liver cell damage, often associated with obesity, insulin resistance, and metabolic syndrome.

Without a comprehensive understanding of the underlying mechanisms driving NASH, it's difficult to develop targeted therapies that address the specific pathways responsible for the disease's development and progression. This can result in a lack of effective treatment options. The diverse nature of NASH, which includes varying degrees of inflammation, fibrosis, and metabolic dysfunction, leads to heterogeneity in patient responses to treatments. A deeper understanding of disease mechanisms could help identify subtypes of NASH and guide personalized treatment approaches.

Developing therapies without a complete understanding of NASH's underlying biology may inadvertently trigger unintended consequences or side effects. This could delay treatment development or even worsen patient outcomes. The lack of clarity about disease mechanisms can extend the drug development process. Researchers may need to conduct more exploratory studies to identify potential therapeutic targets, which can prolong the timeline for bringing new treatments to market. Clinical trials for NASH therapies may have a higher risk of failure if the interventions are not grounded in a deep understanding of disease mechanisms. This can result in resources wasted on unsuccessful trials. This challenge significantly hampers the adoption and usage of such supplements by new customers, ultimately impacting market growth in the forecast period.

Risk of Misdiagnosis and Underdiagnosis

The risk of misdiagnosis and underdiagnosis poses a significant challenge for the global Non-Alcoholic Steatohepatitis (NASH) treatment market. NASH is a liver condition characterized by inflammation and liver cell damage, often associated with obesity, insulin resistance, and metabolic syndrome. Misdiagnosis and underdiagnosis of NASH can lead to delayed or inadequate treatment, impacting patient outcomes and the overall growth of the treatment market. NASH can be asymptomatic, especially in its early stages. Patients may not experience noticeable symptoms, leading to a lack of awareness and delaying diagnosis. This makes it challenging to identify and treat NASH before it progresses to more severe stages.

The symptoms of NASH can overlap with those of other liver conditions, such as alcoholic liver disease, viral hepatitis, and even non-alcoholic fatty liver disease (NAFLD) without inflammation. This similarity can result in misdiagnosis or confusion with other diseases. Unlike certain conditions like diabetes or high blood pressure, routine screening for NASH is not widespread. This means that individuals with risk factors for NASH, such as obesity and metabolic syndrome, might not be tested for the disease, leading to underdiagnosis.

Lack of Non-Invasive Diagnostic Tools

The lack of non-invasive diagnostic tools poses a significant challenge for the global Non-Alcoholic Steatohepatitis (NASH) treatment market. NASH is a liver disease characterized by inflammation and liver cell damage, often associated with obesity, insulin resistance, and metabolic syndrome. Non-invasive diagnostic tools are crucial for

accurately diagnosing NASH, assessing disease severity, and monitoring treatment response. Liver biopsy is considered the gold standard for diagnosing NASH and evaluating liver fibrosis. However, liver biopsy is an invasive procedure that carries risks, discomfort, and potential complications. Patients and healthcare providers are often hesitant to undergo or recommend liver biopsies due to these factors. Due to the invasive nature of liver biopsy, some patients may be unwilling to undergo the procedure, leading to missed opportunities for diagnosis and disease monitoring. This lack of patient compliance can hinder timely intervention and treatment.

The reliance on liver biopsy can lead to underdiagnosis or misdiagnosis of NASH, especially in cases where patients are unwilling to undergo the procedure. This can result in delayed or inadequate treatment. The lack of non-invasive diagnostic tools limits clinicians' ability to accurately diagnose NASH, assess disease severity, and determine appropriate treatment strategies. This unmet need hampers the development of individualized patient care plans.

Key Market Trends

Rise in Clinical Trials

The rise in clinical trials is a significant trend in the Global Non-Alcoholic Steatohepatitis (NASH) Treatment Market. Clinical trials play a pivotal role in advancing our understanding of NASH, evaluating the safety and efficacy of potential treatments, and contributing to the development of novel therapies. The NASH landscape lacks FDA-approved medications as of my last update in September 2021. The rise in clinical trials indicates a growing interest in developing new therapeutic options. These trials focus on testing various drug candidates with diverse mechanisms of action, including targeting inflammation, fibrosis, metabolism, and other pathways associated with NASH. Clinical trials provide a platform to validate the potential of drug candidates. These trials assess the safety, efficacy, and tolerability of investigational medications under controlled conditions. Positive trial results can lead to regulatory approvals and the introduction of new therapies to the market.

The increasing number of clinical trials indicates a robust pipeline of potential NASH treatments. This pipeline diversity includes different drug classes, combination therapies, and interventions aimed at addressing various disease aspects. A vibrant pipeline reflects the commitment of pharmaceutical companies and researchers to addressing NASH's unmet medical need. Clinical trials contribute to a deeper understanding of NASH's pathophysiology and its response to different interventions.

Trials generate valuable data on disease progression, biomarkers, and patient populations, which inform the development of targeted treatments. Clinical trials provide patients with access to innovative therapies and specialized care. Patient participation helps researchers collect critical data, enabling them to refine treatment approaches and gain insights into patient experiences and preferences.

Segmental Insights

Drug Type Insights

Based on the category of Drug Type, the Vitamin E and pioglitazone segment emerged as the dominant player in the global market for Non-Alcoholic Steatohepatitis Treatment in 2023. Vitamin E and pioglitazone were among the drug types explored for the treatment of Non-Alcoholic Steatohepatitis (NASH). Please note that the landscape of NASH treatment is dynamic and constantly evolving.

The Vitamin E is an antioxidant that is believed to help reduce oxidative stress and inflammation in the liver. It has been studied as a potential treatment for NASH due to its ability to counteract oxidative damage. Clinical trials have assessed the use of Vitamin E supplements, specifically alpha tocopherol, for the treatment of NASH. Some trials have shown modest improvements in liver enzymes and histological features of NASH. Vitamin E has been associated with improvements in liver enzymes and histological features of NASH, particularly in individuals with non-diabetic NASH. However, its effectiveness varies, and it might not be suitable for all patient populations. The use of Vitamin E in NASH treatment has been somewhat controversial due to concerns about potential side effects and the variability in treatment response among different patient groups.

Also, the Vitamin E and pioglitazone have shown potential benefits in the treatment of NASH, particularly in specific patient populations. However, it's important to note that neither Vitamin E nor pioglitazone is a definitive or universally effective treatment for NASH. The landscape of NASH treatment continues to evolve, and ongoing research is exploring various drug classes and combination therapies to address the complex pathophysiology of the disease. These factors are expected to drive the growth of this segment.

Regional Insights

North America emerged as the dominant region in the global Non-Alcoholic

Steatohepatitis Treatment market in 2023, holding the largest market share in terms of value. North America, particularly the United States, has been facing a significant burden of obesity, type 2 diabetes, and metabolic syndrome – all of which are major risk factors for NASH. The high prevalence of these conditions contributes to a larger pool of individuals at risk of developing NASH.

The region boasts well-developed healthcare systems, including advanced medical facilities, specialized clinics, and access to cutting-edge diagnostic and treatment technologies. This infrastructure facilitates early diagnosis and comprehensive management of NASH. North America is a hub for clinical research and pharmaceutical innovation. Many research institutions, academic centres, and pharmaceutical companies in the region are actively engaged in developing and testing NASH treatments. The United States and Canada have a strong healthcare education system that raises awareness about chronic diseases, including NASH. This heightened awareness can lead to early detection, diagnosis, and treatment initiation. The pharmaceutical industry in North America has shown a significant interest in NASH research and drug development. This engagement has led to clinical trials, investments, and collaborations to bring NASH therapies to market.

Key Market Players

Intercept Pharmaceuticals Inc.

Galmed Research & Development Ltd.

INVENTIVA S.A.

AbbVie Inc.

Galectin Therapeutics Inc.

Madrigal Pharmaceuticals Inc.

NGM Biopharmaceuticals Inc.

Novo Nordisk A/S

Bristol Myers Squibb

Gilead Sciences Inc.

Report Scope:

In this report, the Global Non-Alcoholic Steatohepatitis Treatment Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Non-Alcoholic Steatohepatitis Treatment Market, By Drug Type:

Vitamin E and Pioglitazone

Obeticholic Acid (OCA)

Lanifibranor

Semaglutide

Resmetirom

Aramchol

Cenicriviroc

Others

Non-Alcoholic Steatohepatitis Treatment Market, By End-User:

Hospital Pharmacies

Retail and Specialty Pharmacies

Others

Non-Alcoholic Steatohepatitis Treatment 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 Non-Alcoholic Steatohepatitis Treatment Market.

Available Customizations:

Global Non-Alcoholic Steatohepatitis Treatment 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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