

Rheumatology Therapeutics Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented by Indication (Ankylosing Spondylitis, Gout, Osteoarthritis, Psoriatic Arthritis, Rheumatoid Arthritis), by Distribution Channel (Hospital Pharmacies, Retail Pharmacies, Online Pharmacies), by region, and Competition

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Abstracts

Global Rheumatology Therapeutics Market has valued at USD 22.34 billion in 2022 and is anticipated to witness an impressive growth in the forecast period with a CAGR of 5.86% by 2028. Rheumatology therapeutics refers to the branch of medical science and healthcare focused on the diagnosis and treatment of rheumatic diseases. Rheumatic diseases are a diverse group of conditions that primarily affect the musculoskeletal system, including the joints, muscles, bones, and connective tissues. These diseases can lead to symptoms such as joint pain, stiffness, inflammation, and limited mobility. Rheumatology therapeutics encompasses various medical approaches and treatments aimed at alleviating these symptoms, managing the underlying disease, and improving the quality of life for individuals affected by these conditions. The rising incidence and prevalence of rheumatic diseases, such as rheumatoid arthritis, osteoarthritis, and lupus, were driving the demand for rheumatology therapeutics. Factors such as an aging population and changes in lifestyle contributed to the higher prevalence.

Biologic drugs, including TNF inhibitors, interleukin inhibitors, and JAK inhibitors, continued to be at the forefront of rheumatology therapeutics. Ongoing research and development efforts led to the introduction of new and more effective biologic therapies. The growth of the biosimilar market for rheumatology drugs was a driver, offering cost-effective alternatives to branded biologic drugs. Biosimilars were expanding access to

treatment while reducing healthcare costs. Advances in genetics and molecular biology were leading to the development of personalized medicine approaches in rheumatology. Tailoring treatments to individual patients based on their genetic and immune profiles improved treatment outcomes. The COVID-19 pandemic accelerated the adoption of telemedicine in rheumatology, allowing patients to receive remote consultations, monitor their conditions, and access care more conveniently.

Key Market Drivers

Increasing Prevalence of Rheumatic Diseases

Rheumatic diseases, such as osteoarthritis, rheumatoid arthritis, and gout, tend to become more common with age. As the global population ages, the prevalence of these conditions naturally increases. Obesity is a risk factor for several rheumatic diseases, including osteoarthritis. The rising rates of obesity in many countries have led to an increased incidence of these conditions. Modern lifestyles often involve less physical activity, which can contribute to the development of rheumatic diseases. Lack of exercise and physical fitness can lead to joint problems and musculoskeletal issues. Some individuals have a genetic predisposition to rheumatic diseases. These genetic factors can make them more susceptible to conditions like rheumatoid arthritis and systemic lupus erythematosus. Certain environmental factors, such as exposure to pollution or toxins, can contribute to the development or exacerbation of rheumatic diseases in susceptible individuals. Improved diagnostic methods and awareness among healthcare professionals have led to more accurate and earlier diagnoses of rheumatic diseases. Many rheumatic diseases are chronic, meaning they persist over time. As a result, patients live with these conditions for longer periods, increasing the overall prevalence. Some rheumatic diseases, like systemic lupus erythematosus, are more common in women. Gender disparities can influence prevalence rates. Rheumatic diseases can lead to or be associated with other health conditions. For example, osteoarthritis may coexist with cardiovascular disease or diabetes, further increasing healthcare burdens. Lifestyle and dietary changes, as well as access to healthcare, can vary significantly across regions and countries. These factors can influence the prevalence of rheumatic diseases. This factor will help in the development of Global Rheumatology Therapeutics Market.

Advancements in Biologic Therapies

Biologic therapies are designed to target specific molecules or cells involved in the immune response. This precision allows for more effective and less harmful treatments

compared to traditional systemic therapies. Biologics have revolutionized the treatment of autoimmune diseases such as rheumatoid arthritis, psoriatic arthritis, ankylosing spondylitis, and systemic lupus erythematosus. They help control the underlying immune system dysfunction responsible for these conditions. Many biologic therapies are monoclonal antibodies that bind to specific proteins, such as tumor necrosis factor (TNF) or interleukins, involved in inflammatory responses. These antibodies block the activity of these molecules, reducing inflammation and tissue damage. Biologics have demonstrated superior efficacy in managing symptoms and slowing the progression of diseases compared to traditional disease-modifying antirheumatic drugs (DMARDs). Because biologics are highly targeted, they often have fewer systemic side effects than traditional treatments like corticosteroids or nonsteroidal anti-inflammatory drugs (NSAIDs). Advances in genomics and biomarker research enable personalized treatment approaches. Doctors can tailor biologic therapies to match a patient's specific disease profile, increasing treatment effectiveness.

Biologics comes in various drug classes, including TNF inhibitors, interleukin inhibitors, B-cell inhibitors, and JAK inhibitors, providing a range of treatment options for different conditions and patient profiles. Some patients benefit from combining biology with other medications, such as traditional DMARDs, to achieve optimal disease control. Biologics initially developed for one condition often find utility in treating other related diseases. This repurposing can benefit a broader patient population. Biosimilars are biologic drugs that are highly like existing biologics but may be more cost-effective. Their availability increases access to biologic therapies. Ongoing research continues to identify new targets and develop innovative biologic therapies, expanding treatment options and improving patient outcomes. Biologics can significantly improve the quality of life for patients with autoimmune and inflammatory diseases, reducing pain, joint damage, and disability. This factor will pace up the demand of Global Rheumatology Therapeutics Market.

Growing Awareness and Diagnosis

Increased awareness about rheumatic diseases and their symptoms has led to earlier and more accurate diagnoses. Early diagnosis is crucial for effective management and preventing long-term joint damage. Patient advocacy groups, healthcare organizations, and healthcare providers have focused on educating the public about rheumatic diseases. This education helps individuals recognize symptoms and seek medical attention promptly. Some regions have implemented screening and awareness programs for conditions like rheumatoid arthritis, which can lead to earlier intervention and better outcomes. Historically, there has been a delay in diagnosing rheumatic

diseases due to their varied and often subtle symptoms. Growing awareness aims to reduce this delay and expedite treatment. Greater awareness has helped change perceptions of rheumatic diseases, which were sometimes dismissed as simply 'aches and pains' in the past. Recognizing the seriousness of these conditions has led to increased demand for effective treatments. Public health campaigns, including Arthritis Awareness Month and World Lupus Day, have raised awareness about rheumatic diseases on a global scale.

Advances in medical imaging, blood tests, and biomarker research have improved diagnostic accuracy, making it easier to identify rheumatic diseases. The prevalence of rheumatic diseases is rising, partly due to factors like an aging population and lifestyle changes. This growing patient population naturally drives demand for rheumatology therapeutics. Informed patients are more likely to engage in their healthcare and seek appropriate treatment. This patient empowerment contributes to the demand for therapeutics. Greater awareness has spurred research and the development of new treatments, giving patients hope for better outcomes. Effective rheumatology therapeutics can significantly improve patients' quality of life, reducing pain, disability, and the need for surgical interventions. Rheumatic diseases can have a substantial economic impact due to medical costs and lost productivity. Raising awareness highlights the societal and economic importance of effective treatment. Awareness efforts have helped reduce the stigma associated with rheumatic diseases, encouraging individuals to seek help and treatment. This factor will accelerate the demand of Global Rheumatology Therapeutics Market.

Key Market Challenges

High Treatment Costs

Many rheumatology medications, particularly biologic drugs, can be extremely expensive. Patients often face high out-of-pocket costs, even with insurance coverage. This financial burden can lead to non-adherence to treatment plans, which can worsen disease outcomes. The high cost of treatment can create disparities in access to care. Patients with limited financial resources may struggle to afford rheumatology therapeutics, potentially leading to delayed diagnosis and inadequate treatment. High treatment costs place a strain on healthcare systems, particularly in countries with publicly funded healthcare. Budget constraints can limit the availability of certain therapies and affect the quality of care provided. The cost of biologic drugs and other rheumatology treatments can contribute to higher health insurance premiums, affecting both individuals and employers providing healthcare coverage. Policymakers and

healthcare advocates are increasingly concerned about the affordability of rheumatology therapeutics. This has led to discussions about pricing reforms and measures to improve drug cost transparency. Rheumatic diseases can lead to disability and reduced work productivity. The economic burden of these diseases, combined with high treatment costs, affects individuals' ability to participate in the workforce. High costs can limit treatment options for patients and healthcare providers, leading to challenges in finding cost-effective, yet efficacious, therapies. The introduction of biosimilars (generic versions of biologic drugs) has the potential to reduce the cost of rheumatology therapeutics. However, increasing adoption and acceptance of biosimilars remain challenges.

Drug Safety and Side Effects

Many medications used in rheumatology therapeutics, including nonsteroidal anti-inflammatory drugs (NSAIDs), disease-modifying antirheumatic drugs (DMARDs), and biologic agents, can have side effects. These side effects range from mild to severe and can affect various body systems. Some rheumatology drugs, particularly immunosuppressive medications like DMARDs and biologics, can weaken the immune system. This increases the risk of infections and requires vigilant monitoring. Biologic drugs, while highly effective, can carry specific side effects related to immunosuppression and their mechanism of action. These side effects may include an increased risk of certain infections, injection site reactions, and infusion-related reactions. NSAIDs, commonly used for pain and inflammation, can lead to gastrointestinal side effects, including stomach ulcers and bleeding. Some rheumatology medications, such as certain NSAIDs, have been associated with an increased risk of cardiovascular events. Long-term use of corticosteroids, which are sometimes prescribed for rheumatic diseases, can lead to bone loss and an increased risk of osteoporosis. Some medications can affect blood cell counts, leading to conditions like anemia, leukopenia, or thrombocytopenia. Certain rheumatology drugs may affect liver and kidney function, necessitating regular monitoring. Patients can experience allergic reactions to certain medications, which can range from mild rashes to severe anaphylactic reactions. Some medications may cause mood changes, anxiety, or depression in some individuals.

Key Market Trends

Patient-Centric Care

Rheumatologists and healthcare providers are increasingly engaging patients in shared

decision-making. This approach involves discussing treatment options, risks, benefits, and patient preferences to arrive at a mutually agreed-upon treatment plan. Recognizing that rheumatic diseases can vary widely in their presentation and impact, patient-centric care emphasizes tailoring treatment plans to the specific needs of each patient. This may include selecting medications or therapies based on the patient's disease severity, lifestyle, and comorbidities. Informed patients are better equipped to actively participate in their care. Healthcare providers in rheumatology are placing a strong emphasis on educating patients about their conditions, treatment options, and self-management strategies. Patient-centric care also addresses issues of access and affordability. Healthcare providers and institutions work to ensure that patients have access to the treatments they need and that financial barriers are minimized whenever possible. Patients are encouraged to actively participate in monitoring their disease activity and reporting any changes or concerns to their healthcare providers. Regular follow-up appointments and communication are essential components of patient-centric care. Since pain is a common symptom of rheumatic diseases, patient-centric care places a strong focus on pain management strategies tailored to individual patient needs. Rheumatology therapeutics are not just about managing physical symptoms; they also consider the emotional well-being of patients. Addressing the psychological aspects of living with a chronic condition is integral to patient-centric care.

Segmental Insights

Indication Insights

In 2022, the Global Rheumatology Therapeutics Market largest share was held by Osteoarthritis segment and is predicted to continue expanding over the coming years. Osteoarthritis is one of the most common forms of arthritis, and it affects a large portion of the global population, particularly in aging populations. This high prevalence contributes to the significant market share as more patients seek treatment. The global population is aging, and osteoarthritis is more common among older individuals. With the demographic shift towards older age groups in many countries, there's a growing patient population in need of osteoarthritis treatments. Factors like obesity, sedentary lifestyles, and physical trauma are associated with an increased risk of developing osteoarthritis. These lifestyle-related risk factors contribute to the continued prevalence of the condition. Osteoarthritis is a chronic, degenerative condition for which there are no known curative treatments. Therefore, patients often require long-term management with medications and therapies, leading to a sustained market for osteoarthritis therapeutics.

Distribution Channel Insights

In 2022, the Global Rheumatology Therapeutics Market largest share was held by hospital pharmacies segment in the forecast period and is predicted to continue expanding over the coming years. Hospitals often play a central role in the diagnosis and initial treatment of severe or acute rheumatic diseases. Patients with such conditions may receive their initial medications and therapies through hospital pharmacies. Some rheumatic diseases require specialized care and medications, which are typically administered or dispensed within a hospital setting due to the complexity of the treatments. Hospitals provide both inpatient and outpatient services. Patients may receive rheumatology therapeutics during their hospital stay and continue their treatment through the hospital's outpatient pharmacy. Patients with acute rheumatic disease flares or complications may seek emergency care at hospitals, where they can receive immediate treatment through the hospital pharmacy.

Regional Insights

The North America region dominates the Global Rheumatology Therapeutics Market in 2022. Due to government legislation, the availability of a strong healthcare infrastructure, the high prevalence of birth abnormalities in the region, and new technological advancements in Nuclear Medicine Therapeutics technologies by the players operating in the region. The United States is predicted to have the greatest market share in the North American area. This is due to both the expanding need for sophisticated systems and the rising incidence rates of diseases in neonates. The study of diagnostic markers in blood spots collected on filter paper on an infant's second day of life is how every newborn in the United States is examined post-birth.

Key Market Players

AbbVie Inc.

Bristol-Myers Squibb Company

Pfizer Inc.

Merck & Co., Inc.

Amgen Inc.

Novartis AG

Janssen Pharmaceuticals, Inc.

Sanofi SA

Takeda Pharmaceutical Company Limited

Johnson & Johnson Private Limited

F. Hoffmann-La Roche Ltd

Report Scope:

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

Rheumatology Therapeutics Market, By Indication:

Ankylosing Spondylitis

Gout

Osteoarthritis

Psoriatic Arthritis

Rheumatoid Arthritis

Rheumatology Therapeutics Market, By Distribution Channel:

Hospital Pharmacies

Retail Pharmacies

Online Pharmacies

Global Rheumatology Therapeutics 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 present in the Global Rheumatology Therapeutics Market.

Available Customizations:

Global Rheumatology 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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