

United States Hereditary Angioedema Therapeutics Market By Treatment (C1-esterase inhibitor, Bradykinin B2 receptor antagonist, Kallikrein inhibitor, Others), By Route of Administration (Intravenous, Subcutaneous, Oral), By End-use (Prophylaxis, On-demand) Region and Competition, Forecast and Opportunities, 2019-2029F

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Abstracts

United States Hereditary Angioedema Therapeutics Market was valued at USD 846.80 million in 2023 and is anticipated to grow with a CAGR of 7.12% through 2029. United States Hereditary Angioedema (HAE) Therapeutics Market is an integral aspect of the nation's healthcare landscape, dedicated to addressing a rare and potentially life-threatening genetic disorder. Hereditary Angioedema manifests as recurrent and severe swelling in various body parts, including the face, hands, feet, and gastrointestinal tract. The market is primarily fueled by the imperative to offer effective treatments for individuals grappling with this debilitating condition. Recent years have witnessed notable growth in the U.S. HAE therapeutics market, driven by advancements in research and the development of innovative therapies. While traditional treatments like C1 inhibitor replacement therapy and bradykinin receptor antagonists have long been fundamental to HAE management, there's been a surge in the approval and adoption of modern therapies, including subcutaneous and oral options, revolutionizing the management approach. Multiple pharmaceutical companies are actively involved in developing and bringing HAE therapeutics to market in the United States. These advancements not only enhance the quality of life for HAE patients but also broaden treatment options for healthcare providers, reducing attack frequency and severity. The U.S. HAE therapeutics market is fiercely competitive, with established and emerging players striving to offer innovative treatment options characterized by convenience,

efficacy, and safety. The market's growth is propelled by heightened awareness of HAE, enhanced diagnostic capabilities, and an expanding patient population.

Key Market Drivers

Rising Awareness and Improved Diagnosis

Increased awareness and enhanced diagnostic capabilities have played a significant role in the expansion of the United States Hereditary Angioedema (HAE) Therapeutics Market. HAE, a rare genetic disorder characterized by recurring and potentially severe swelling episodes, poses life-threatening risks when left untreated. Efforts to raise awareness about HAE have led to more precise and timely diagnoses of the condition over time. Patient advocacy groups and rare disease-focused organizations have been instrumental in boosting awareness about HAE. Their diligent efforts have involved educating healthcare professionals, patients, and the public about HAE symptoms, genetic underpinnings, and potential complications. Consequently, HAE is now recognized earlier, prompting swift referrals to specialists for thorough evaluation. Timely diagnosis of HAE is crucial for prompt intervention and the administration of suitable treatments. Advanced diagnostic methods, such as genetic testing and biomarker assessments, have facilitated the confirmation of HAE. The healthcare professionals are better equipped to identify HAE symptoms, including swelling, abdominal discomfort, and airway obstruction. This heightened awareness has expedited and refined diagnoses, ensuring prompt treatment initiation for HAE individuals without undue delays.

Advancements in Research and Development

Advancements in research and development have been instrumental in driving the United States Hereditary Angioedema (HAE) Therapeutics Market to unprecedented levels. HAE, a rare genetic disorder marked by recurrent and potentially life-threatening swelling episodes, has witnessed groundbreaking innovations in treatment owing to ongoing progress in medical research. Traditionally, HAE management relied on therapies like C1 inhibitor replacement therapy and bradykinin receptor antagonists, which, though effective, posed limitations such as the need for intravenous administration and frequent injections, presenting challenges for patients. However, recent research endeavors have ushered in a new era of HAE therapeutics that are reshaping the management landscape.

A significant stride has been the introduction of subcutaneous and oral therapies,

providing patients with more convenient and less invasive administration routes, thereby alleviating the physical and emotional burdens associated with HAE management. These therapies often boast extended durations of action, allowing patients longer intervals between treatments, thereby enhancing their overall quality of life. Pharmaceutical companies are leading this surge in research and development, focusing on creating treatments that are not only more effective and safer but also more patient-centric. This focus has led to the approval of several groundbreaking therapies, such as lanadelumab (Takhzyro), which offer sustained prevention of attacks and reduced administration frequency compared to prior treatments. Such innovations have not only elevated patient outcomes but also alleviated the strain on healthcare systems by reducing emergency hospitalizations.

Approval of Breakthrough Therapies

The rapid expansion of the United States Hereditary Angioedema (HAE) Therapeutics Market has been propelled by the approval of groundbreaking therapies. HAE, characterized by recurrent, potentially life-threatening swelling episodes, has seen notable improvements in treatment thanks to proactive evaluations and approvals by the United States Food and Drug Administration (FDA). A significant milestone in the HAE therapeutics market has been the approval of both prophylactic and acute treatment options. These breakthrough therapies aim to prevent or manage HAE attacks more effectively, diminishing the frequency and severity of symptoms. For example, lanadelumab (Takhzyro), a monoclonal antibody approved for prophylactic use, offers long-term prevention of HAE attacks, revolutionizing patients' lives by reducing the need for frequent treatments.

The approval of acute treatment options like ecallantide (Kalbitor) and icatibant (Firazyr) has provided individuals with HAE with more efficient means of managing sudden attacks, rapidly alleviating symptoms and averting life-threatening complications. The availability of these breakthrough therapies not only enhances the overall well-being of HAE patients but also alleviates the burden on healthcare systems. Reduced emergency hospitalizations and doctor visits translate to substantial cost savings and improved resource allocation within the healthcare sector.

Key Market Challenges

High Treatment Costs

In recent years, the United States Hereditary Angioedema (HAE) Therapeutics Market

has witnessed significant advancements, introducing innovative treatments that have notably enhanced the quality of life for individuals grappling with this rare genetic disorder. However, a formidable obstacle persists within the market—the exorbitant cost of HAE treatments. These elevated treatment expenses erect barriers to access and can profoundly impact patients' lives. HAE entails recurrent and potentially life-threatening swelling episodes, necessitating effective management to avert severe complications such as airway obstruction and organ damage. To achieve this, patients often rely on ongoing prophylactic and acute treatments, which, while highly efficacious, carry a hefty price tag. The financial burden of HAE therapies can prove overwhelming for both patients and healthcare systems alike. Despite insurance coverage, patients may encounter significant out-of-pocket costs like copayments and deductibles. For those lacking adequate insurance, the financial strain can be debilitating, forcing difficult choices between vital treatments and other essential expenses. Alongside the high treatment costs, patients may also contend with expenses linked to doctor visits, diagnostic examinations, and hospital stays. These cumulative expenses compound the financial strain on individuals and their families, exacerbating stress and anxiety alongside the physical challenges of managing HAE.

Adherence and Long-Term Management

The United States Hereditary Angioedema (HAE) Therapeutics Market has made significant strides recently, offering innovative treatments that hold promise for better management of this rare genetic disorder. However, a persistent obstacle affecting the effectiveness of these therapies and the market as a whole is the issue of adherence and long-term treatment maintenance. Consistent adherence to prescribed regimens over extended periods is crucial for successfully managing HAE. HAE is characterized by recurrent and unpredictable swelling episodes that can pose life-threatening risks. Therefore, maintaining regular adherence to prescribed treatments is vital for preventing acute attacks, minimizing symptom severity, and enhancing overall patient quality of life.

One of the main challenges to adherence is the frequent administration required by many HAE therapies, particularly prophylactic options that entail regular injections. Patients often express reluctance or fear of needles, making self-administration of these therapies daunting. The physical and emotional discomfort associated with frequent injections can lead to non-adherence or treatment interruptions. The repetitive nature of treatment can lead to treatment fatigue. Patients may grow weary of continuous management and may inadvertently reduce adherence as a coping mechanism. This can have serious consequences, as missed or delayed treatments heighten the risk of HAE attacks and associated complications.

Key Market Trends

Advanced Monoclonal Antibodies

Advanced monoclonal antibodies have emerged as a potent driver propelling the United States Hereditary Angioedema (HAE) Therapeutics Market to unprecedented heights. These groundbreaking treatments signify a significant leap forward in HAE management, providing patients with prolonged defense against attacks and fundamentally altering the treatment approach. Monoclonal antibodies such as lanadelumab (Takhzyro) and berotralstat (Orladeyo) have been instrumental in the market, serving as prophylactic therapies. They function by inhibiting specific pathways implicated in HAE attacks, effectively preventing or mitigating the frequency and severity of these distressing episodes. Unlike conventional treatments that often necessitate frequent intravenous administrations, these advanced monoclonal antibodies are administered subcutaneously and boast extended dosing intervals, greatly enhancing patient convenience.

The advent of long-acting monoclonal antibodies has revolutionized the landscape for individuals with HAE. It not only substantially alleviates the burden of frequent injections but also affords patients a level of protection previously unattainable. With these therapies, HAE patients can now enjoy extended periods, spanning weeks or even months, between doses, granting them newfound freedom and normalcy in their daily lives. The impact of advanced monoclonal antibodies transcends mere convenience. They hold the potential to revolutionize the lives of HAE patients by mitigating the fear, anxiety, and disruptions stemming from unpredictable attacks. These treatments provide consistent, sustained disease management, leading to a marked enhancement in overall patient quality of life and a diminished reliance on on-demand therapies.

Early Diagnosis and Genetic Testing

Early detection and genetic testing are pivotal drivers fueling the expansion of the United States Hereditary Angioedema (HAE) Therapeutics Market. These advancements play a crucial role in identifying individuals predisposed to HAE, facilitating timely intervention, personalized treatment, and enhanced patient outcomes. Given the rarity of HAE and its genetic basis, early diagnosis holds paramount importance in managing the condition effectively. Advancements in genetic testing now enable individuals to undergo testing for specific genetic mutations associated with HAE, even before symptomatic manifestation. This proactive approach permits the

implementation of personalized treatment strategies and preventative measures. Genetic testing stands out as a highly precise diagnostic tool for HAE, furnishing healthcare practitioners with conclusive insights into a patient's genetic composition. The availability of genetic testing has substantially mitigated the uncertainty previously inherent in HAE diagnosis, sparing patients from protracted diagnostic journeys marked by misdiagnoses and ineffective therapies.

Segmental Insights

Treatment Insights

Based on the Treatment, C1-esterase inhibitor emerged as the dominant segment in the United States market for United States Hereditary Angioedema Therapeutics Market in 2023. C1-esterase inhibitor therapy, which includes both plasma-derived and recombinant versions, has been a cornerstone in HAE management for many years. These treatments are known for their proven efficacy in both preventing attacks (prophylaxis) and treating acute attacks. This long history of success has established C1-esterase inhibitors as a reliable and trusted option for HAE patients. C1-esterase inhibitors are available in various forms, including intravenous (IV), subcutaneous (SC), and recombinant versions. This variety of administration methods allows healthcare providers to tailor treatment to individual patient needs, preferences, and clinical circumstances. This flexibility makes C1-esterase inhibitors an attractive choice for a diverse patient population.

Route of Administration Insights

Based on the route of administration, the subcutaneous segment emerged as the dominant player in the United States market for United States Hereditary Angioedema Therapeutics Market in 2023. Subcutaneous administration presents a convenient and patient-centric approach to administering therapies for Hereditary Angioedema (HAE). Patients or their caregivers can self-administer these treatments at home without requiring assistance from healthcare professionals. This level of autonomy and self-care resonates with many patients, fostering improved adherence to treatment regimens. The availability of long-acting subcutaneous formulations of HAE therapies, such as lanadelumab (Takhzyro), has revolutionized treatment strategies. These formulations provide prolonged protection against HAE attacks, enabling patients to extend the time between doses. This extended duration of efficacy reduces the frequency of administrations and enhances patient adherence.

Regional Insights

Mid-West emerged as the dominant player in the United States Hereditary Angioedema Therapeutics Market in 2023, holding the largest market share. The Midwest region boasts a significant patient population, which includes individuals with Hereditary Angioedema (HAE). The region's abundance of HAE treatment centers and renowned experts has drawn patients seeking specialized care. This clustering of patients has spurred the demand for HAE therapeutics in the Midwest. Numerous pharmaceutical companies specializing in rare diseases and HAE are either headquartered or maintain a substantial presence in the Midwest. These companies have made substantial investments in research, development, and the marketing of HAE therapeutics, thereby fueling the market's expansion.

Key Market Players

BioCryst Pharmaceuticals, Inc.

Ionis Pharmaceuticals, Inc.

Seqirus Pty Ltd. (CSL Limited)

Attune Pharmaceuticals, Inc.

Adverum Biotechnologies, Inc.

KalVista Pharmaceuticals, Inc.

Takeda Pharmaceutical Company Limited

Pharming Healthcare N.V.

Sanofi AG

Cipla Ltd.

Report Scope:

In this report, the United States Hereditary Angioedema Therapeutics Market has been segmented into the following categories, in addition to the industry trends which have

also been detailed below:

United States Hereditary Angioedema Therapeutics Market,By Treatment:

oC1-esterase inhibitor

oBradykinin B2 receptor antagonist

oKallikrein inhibitor

oOthers

United States Hereditary Angioedema Therapeutics Market,By Route of Administration:

oIntravenous

oSubcutaneous

oOral

United States Hereditary Angioedema Therapeutics Market,By End Use:

oProphylaxis

oOn-demand

United States Hereditary Angioedema Therapeutics Market, By Region:

oNorth-East

oMid-west

oWest

oSouth

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United

United States Hereditary Angioedema Therapeutics Market By Treatment (C1-esterase inhibitor, Bradykinin B2 rec...

States Hereditary Angioedema Therapeutics Market.

Available Customizations:

United States Hereditary Angioedema 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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