

Middle East & Africa Transdermal Drug Delivery System Market Forecast to 2030 - Regional Analysis - by Type (Transdermal Patches, Transdermal Gel, Transdermal Sprays, and Others), Application (Cardiovascular Diseases, Central Nervous System Disorders, Pain Management, Hormonal Applications, and Other Applications), and Distribution Channel (Hospitals Pharmacies, Retail Pharmacies, Online Pharmacies, and Others)

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Abstracts

The Middle East & Africa transdermal drug delivery system market is expected to grow from US\$ 1,147.56 million in 2022 to US\$ 1,525.09 million by 2030. It is estimated to register a CAGR of 3.6% from 2022 to 2030.

Increasing Prevalence of Chronic Diseases Bolsters Middle East & Africa Transdermal Drug Delivery System Market

Cardiovascular diseases (CVDs) such as angina, atherosclerosis, pectoris, and acute myocardial infarction are among the common causes of mortality in the world. According to the WHO, CVDs are the major cause of ~17.9 million deaths worldwide every year. Many medicines are commercially available for the treatment of CVDs but conventional capsules and tablets are unable to effectively control the ailment. This underlines the need for novel drug delivery systems providing prolonged drug bioavailability and targeted drug delivery to the affected areas of the cardiovascular system. Transdermal drug delivery systems offer many advantages over regular orally administered drugs to treat cardiovascular diseases. Transdermal patches,

encompassing drug particles, are applied on the skin surface. A cardiac patch provides an excellent platform for cell engraftment improvement. For example, a vascularized cardiac patch developed recently shows promising potential for treating ischemic heart injuries. Nitroglycerin transdermal patches are used to prevent angina (chest pain) episodes in people with coronary artery disease. They work by relaxing the blood vessels and reducing the stress on the heart, thereby lowering the need for oxygen. However, these patches cannot be used to treat angina attacks that have already begun.

Rivastigmine patch is used to treat dementia (memory loss) associated with mild, moderate, or severe Alzheimer's disease or mild-to-moderate dementia associated with Parkinson's disease. Rivastigmine and donepezil are cholinesterase inhibitors exhibiting a dose-response relationship, with higher doses of the drugs demonstrating greater efficacy. It is a small, lipophilic, and hydrophilic molecule that is chemically well-suited for transdermal delivery.

Diabetes is a life-threatening chronic disease having no specialized cure. Both types of diabetes can lead to various problems in different body parts and increase the overall risk of premature death. According to the International Diabetes Federation (IDF) Diabetes Atlas 10th edition reports, in 2021, globally 537 million adults (20-79 years) were diabetic, and the number is likely to reach 643 million by 2030 and 783 million by 2045. Exogenous insulin is usually administered subcutaneously for diabetes management. However, the recent attention toward a smart patch that delivers insulin when needed, simplifying insulin intake and activating targeted action.

Thus, the increasing incidences of chronic diseases such as cardiovascular diseases, Alzheimer's disease, and diabetes bolster the growth of the transdermal drug delivery system market.

Middle East & Africa Transdermal Drug Delivery System Market Overview

The transdermal drug delivery system market in the MEA is segmented into the UAE, Saudi Arabia, South Africa, and the Rest of MEA. The market growth is expected to grow due to the high prevalence of chronic diseases, increasing healthcare expenditure, and rising R&D activities across the region. Moreover, the rising demand for technologically advanced medical devices helps propel the market growth during the forecast period. According to a study "Noncommunicable diseases and health system responses in Saudi Arabia: focus on policies and strategies. A qualitative study," published by Health Research Policy and Systems in 2022, noncommunicable diseases

(NCDs), particularly diabetes, CVD, and other chronic diseases, are responsible for an increasing disease and economic burden in Saudi Arabia. According to Saudi Health Ministry statistics, cardiovascular diseases account for 37% of all deaths in Saudi Arabia. According to the United Nations Population Fund (UNFPA), Saudi Arabia is expected to experience a five-fold rise in the aging population from 2 million (5.9%) in 2020 to 10.5 million by 2050 (23.7%). The geriatric population is prone to health conditions such as cardiovascular diseases, lung infections, and diabetes. According to Global Burden of Disease data published in 2020, Saudi Arabia has a high prevalence of noncommunicable diseases such as stroke, heart disease, kidney disease, COPD, and diabetes. Furthermore, deaths related to diabetes increased by ~79%, chronic kidney disease by 41.2%, and stroke by 27.6% between 2009 and 2019. Thus, the high prevalence of mentioned diseases fuels the demand for transdermal drug delivery systems, thereby boosting the market growth.

Saudi Arabia partnered with the UK academic and research institutions in 2019 for a US\$1.6 billion initiative to enhance the Kingdom's domestic research and development capabilities. In Saudi Arabia, due to the increasing demand for healthcare services, the rising government initiatives favor increased participation from the private sector for their expansion. Thus, the rising prevalence of cardiovascular diseases in the population and the rise in healthcare expenditure in Saudi Arabia play a vital role in the growth of the transdermal drug delivery system market.

Middle East & Africa Transdermal Drug Delivery System Market Revenue and Forecast to 2030 (US\$ Million)

Middle East & Africa Transdermal Drug Delivery System Market Segmentation

The Middle East & Africa transdermal drug delivery system market is segmented into type, application, distribution channel, and country.

Based on type, the Middle East & Africa transdermal drug delivery system market is segmented into transdermal patches, transdermal gel, transdermal sprays, and others. The transdermal gel segment held the largest share of the Middle East & Africa transdermal drug delivery system market in 2022. The transdermal patches is further sub segmented into drug-in-adhesive patches, matrix patches, reservoir membrane patches, and vapor patches.

In terms of application, the Middle East & Africa transdermal drug delivery system market is categorized into cardiovascular diseases, central nervous system disorders,

pain management, hormonal applications, and other applications. The pain management segment held the largest share of the Middle East & Africa transdermal drug delivery system market in 2022. The pain management is further sub segmented into opioid and non-opioid. The hormonal applications is further sub segmented into transdermal estrogen & progesterone therapy and testosterone replacement.

By distribution channel, the Middle East & Africa transdermal drug delivery system market is segmented into hospitals pharmacies, retail pharmacies, online pharmacies, and others. The hospitals pharmacies segment held the largest share of the Middle East & Africa transdermal drug delivery system market in 2022.

Based on country, the Middle East & Africa transdermal drug delivery system market is categorized into the UAE, Saudi Arabia, South Africa, and the Rest of Middle East & Africa. Saudi Arabia dominated the Middle East & Africa transdermal drug delivery system market in 2022.

Boehringer Ingelheim International GmbH, GSK Plc, Hisamitsu Pharmaceutical Co Inc, Johnson & Johnson, Novartis AG, and Viartis Inc are some of the leading companies operating in the Middle East & Africa transdermal drug delivery system market.

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