

North America 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 North America transdermal drug delivery system market is expected to grow from US\$ 14,977.62 million in 2022 to US\$ 20,958.37 million by 2030. It is estimated to register a CAGR of 4.3% from 2022 to 2030.

Increasing Prevalence of Chronic Diseases Drives North America 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.

According to the Alzheimer's association report, in 2019, Alzheimer disease was ranked sixth and in 2020 and 2021 it was ranked seventh among the leading causes of death in the US. According to the 2023 stats by the National Institute of Health, ~6.7 million Americans (i.e., 1 in 9 people or 10.8% of the population), aged 65 and older, have Alzheimer's dementia. The percentage of people with Alzheimer's dementia increases with age. 5% of people aged 65-74, 13.1% aged 75-84, and 33.3% aged 85 and above have Alzheimer's dementia. According to the "Global Prevalence of Young-Onset Dementia" report published in 2021, the prevalence of younger-onset dementia in the US is estimated at 110 of every 100,000 people aged 30-64 years, or ~200,000 Americans in total. 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.

North America Transdermal Drug Delivery System Market Overview

The North American transdermal drug delivery system market is segmented into the US, Canada, and Mexico. In 2022, the US held the largest share of the North America transdermal drug delivery system market. The growing innovations in the transdermal drug delivery systems and increasing central nervous system disorders are among the few factors projected to accelerate the growth of the North America transdermal drug delivery system market during the forecast period. Moreover, increasing R&D activities

and the introduction of novel products are propelling the market for transdermal drug delivery systems. According to the American Heart Association (AHA), cardiovascular disease (CVD) remains the leading cause of death in the US. According to the CDC, in 2021, CVD accounted for ~695,000 deaths and ~1 in 5 deaths in the US. The rising prevalence of cardiovascular disease, diabetes, chronic pain conditions, and other chronic diseases drives the demand for effective and convenient treatment options. Medical patches offer a noninvasive and patient-friendly approach to deliver medication and manage symptoms associated with these chronic conditions. Ongoing advancements in TDDS, such as wearable sensors and flexible electronics, contribute to the growth of the transdermal drug delivery system market. These advancements allow for more accurate dosing, enhanced patient monitoring, and improved patient compliance. According to a report titled "Recent advances in transdermal drug delivery systems," published by Biomaterials Research in 2021, microneedles attract significant attention among TDDS modalities, which overcome the limitations of the existing simple application type and patch-type needles by combining the advantages of microneedles to obtain higher treatment efficiency and effects. Advances in these TDDS can provide the driving force for controlling the prevalence of cardiovascular and central nervous system diseases, diabetes, neuromuscular diseases, and infectious and localized infectious diseases.

The growing trend of personalized medicines, where treatments are tailored to individual patients, has boosted the development of medical patches that offer controlled and targeted drug delivery. This customization allows for better patient outcomes and improved therapeutic efficacy. For instance, in 2020, Reddy's Laboratories launched an Authorized Generic Version of NitroDur (nitroglycerin) Transdermal Infusion System in the US market. With the growing emphasis on home healthcare and remote patient monitoring, medical patches offer a convenient solution for delivering medications and monitoring vital signs outside traditional healthcare settings. The US transdermal drug delivery system market is influenced by factors such as the increasing prevalence of chronic diseases, rising technological advancements, and growing focus on personalized medicines.

North America Transdermal Drug Delivery System Market Revenue and Forecast to 2030 (US\$ Million)

North America Transdermal Drug Delivery System Market Segmentation

The North America transdermal drug delivery system market is segmented into type, application, distribution channel, and country.

Based on type, the North America 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 North America 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 North America transdermal drug delivery system market is segmented into cardiovascular diseases, central nervous system disorders, pain management, hormonal applications, and other applications. The pain management segment held the largest share of the North America 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.

Based on distribution channel, the North America 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 North America transdermal drug delivery system market in 2022.

Based on country, the North America transdermal drug delivery system market is segmented into the US, Canada, and Mexico. The US dominated the North America transdermal drug delivery system market in 2022.

Boehringer Ingelheim International GmbH, GSK Plc, Hisamitsu Pharmaceutical Co Inc, Johnson & Johnson, Lavipharm SA, Luye Pharma Group Ltd, Novartis AG, Purdue Pharma LP, UCB SA, and Viatrix Inc are some of the leading companies operating in the North America transdermal drug delivery system market.

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