Idiopathic Pulmonary Fibrosis - Market Insight, Epidemiology And Market Forecast - 2032

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Report description:

DelveInsight's 'Idiopathic Pulmonary Fibrosis -Market Insights, Epidemiology, and Market Forecast-2032' report deliver an in-depth understanding of the Idiopathic Pulmonary Fibrosis , historical and forecasted epidemiology as well as the Idiopathic Pulmonary Fibrosis market trends in the United States, EU5 (Germany, France, Italy, Spain, and the United Kingdom) and Japan.
The Idiopathic Pulmonary Fibrosis market report provides current treatment practices, emerging drugs, market share of the individual therapies, current and forecasted 7MM Idiopathic Pulmonary Fibrosis market size from 2019 to 2032. The Report also covers current Idiopathic Pulmonary Fibrosis treatment practice, market drivers, market barriers, SWOT analysis, reimbursement, market access, and unmet medical needs to curate the best of the opportunities and assesses the underlying potential of the market.
Geography Covered
- The United States.
- EU5 (Germany, France, Italy, Spain, and the United Kingdom).
- Japan.

Study Period: 2019-2032
Idiopathic Pulmonary Fibrosis Disease Understanding and Treatment Algorithm
Idiopathic Pulmonary Fibrosis Overview
Idiopathic Pulmonary Fibrosis (IPF) is a rare, chronic, progressive fibrosing interstitial pneumonia that is found to affect middle-aged and older adults. It affects lung tissue (alveoli in particular) by either thickening, stiffening, or persistent and progressive scarring (fibrosis), which increases irreversibly over time. If an individual has IPF, scarring affects the air sacs, limiting the amount of oxygen that gets into the blood. With less oxygen in the blood, one can get breathlessness from everyday activities, like walking. This group of lung disorders is also known as 'Diffuse Parenchymal Lung Diseases,' which is characterized by a broader umbrella of 'Interstitial Lung Diseases (IDLs).
It is a form of interstitial lung disease, primarily involving the interstitium (the tissue and space around the air sacs of the lungs)

and not directly affecting the airways or blood vessels. Many other kinds of interstitial lung disease can also cause inflammation and/or fibrosis, and these are treated differently.

Idiopathic Pulmonary Fibrosis Diagnosis

Careful evaluation of clinical, laboratory, X-ray data and high resolution computed tomography (HRCT), and at times lung biopsy material to make a confident diagnosis. This is usually done by a respiratory specialist in union with other specialists with interest in IPF. The diagnosis of IPF relies on the clinician to assimilate and correlate the clinical, laboratory, radiologic, and/or pathologic data.

There are several diagnostic tools available and the consensus guidelines have been well defined to identify IPF. Pulmonary function tests are performed to assess for restrictive lung disease which is characterized by decreased lung volumes (especially decreased forced vital capacity, total lung capacity, and functional residual capacity) and decreased diffusion capacity. When IPF is suspected, laboratory tests to exclude autoimmune disease are also performed. Chest imaging is like x-rays is done but when they are not detailed enough to confirm IPF. High-resolution CT (HRCT) of the chest is performed. Patients may also be referred to a surgeon for a lung biopsy under general anesthesia in some instances.

Continued in the report?..

Idiopathic Pulmonary Fibrosis Treatment

The therapeutic approach of IPF involves both non-pharmacological and pharmacological strategies. The goal of the treatment is to slow disease progression, reduce symptoms, prevent acute exacerbations, and prolong the survival. There are two anti-fibrotic agents ESBRIET (Roche) and OFEV (Boehringer Ingelheim) approved for use in IPF. Both drugs are known to slow the disease progression but do not significantly impact mortality.

Continued in the report?..

Idiopathic Pulmonary Fibrosis Epidemiology

The disease epidemiology covered in the report provides historical as well as forecasted epidemiology segmented by diagnosed prevalent cases of idiopathic pulmonary fibrosis, gender-specific diagnosed prevalent cases of idiopathic pulmonary fibrosis, age-specific diagnosed prevalent cases of idiopathic pulmonary fibrosis, and severity-specific diagnosed prevalent cases of idiopathic pulmonary fibrosis scenario of Idiopathic Pulmonary Fibrosis in the 7MM covering the United States, EU5 countries (Germany, France, Italy, Spain, and the United Kingdom) and Japan from 2019 to 2032.

Key Findings

- The total diagnosed prevalent cases of IPF in the 7MM was 194,878 cases in 2021 which is expected to rise, at a CAGR of 1.1% during the study period (2019-2032).
- The highest diagnosed prevalent cases of IPF was accounted by the US in 2021, with 94,736 cases in the 7MM, which is expected to show a steep rise soon due to the improvement in diagnostic testing and increasing population.
- Among the European countries, Germany had the highest diagnosed prevalent population of IPF with 20,774 cases, followed by the UK with 15,760 cases in 2021. On the other hand, Spain had the lowest diagnosed prevalent population.
- In the epidemiology model of DelveInsight, we have considered four age groups for the categorization of IPF i.e. 18-39 years, 40-59 years, 60-79 years, and >80 years. As per our analysis, a highest percentage of diagnosed prevalent cases was observed in age group 60-79, in all the 7MM countries.
- As per DelveInsight's analysis the males are predominantly affected highly with IPF than females. In 2021, there were 121,389 males and 73,488 females affected by IPF in the 7MM.
- Japan accounted for 21,246 cases of total diagnosed prevalent cases of IPF in 2021 which are anticipated to rise by the end of 2032.

Idiopathic Pulmonary Fibrosis Epidemiology

The epidemiology segment also provides the Idiopathic Pulmonary Fibrosis epidemiology data and findings across the United States, EU5 (Germany, France, Italy, Spain, and the United Kingdom), and Japan.

Idiopathic Pulmonary Fibrosis Drug Chapters

The drug chapter segment of the Idiopathic Pulmonary Fibrosis report encloses the detailed analysis of Idiopathic Pulmonary Fibrosis marketed drugs, mid-phase, and late-stage pipeline drugs. It also helps to understand the Idiopathic Pulmonary Fibrosis clinical trial details, expressive pharmacological action, agreements and collaborations, approval, and patent details of each

included drug, and the latest news and press releases.
Idiopathic Pulmonary Fibrosis Marketed Drugs
ESBRIET (Pirfenidone): Hoffmann-La Roche Ltd
ESBRIET is an orally administered, anti-inflammatory and antifibrotic prescription medicine used for the treatment of mild and moderate cases of IPF in adults. The drug acts by reducing the amount of lung fibrosis by blocking secretions responsible for excessive collagen production and prolonging the patient's survival by slowing the progression of the disease.
OFEV (Nintedanib): Boehringer Ingelheim Pharma GmbH & Co. KG
OFEV is a prescription drug for the treatment of IPF in adults. Nintedanib is the key ingredient and is a kinase inhibitor that inhibits multiple receptor tyrosine kinases (RTKs) and non-receptor tyrosine kinases (nRTKs).
Products detail in the report?
Idiopathic Pulmonary Fibrosis Emerging Drugs
Pamrevlumab: FibroGen
FibroGen is developing Pamrevlumab (also known as FG-3019), an intravenously administered, first-in-class, fully-humanized monoclonal antibody that inhibits the activity of connective tissue growth factor activity, or CTGF, a critical mediator in the progression of fibrosis and related serious diseases.
PRM-151 (RG6354): Hoffmann-La Roche Ltd
PRM-151 (RG6354) is an intravenously administered, recombinant human serum amyloid P/pentraxin 2 protein (PTX2) that is being developed by Roche. Pentraxin 2 is an endogenous protein - present in humans - that regulates the fibrosis response. It helps the immune system to naturally reverse and turn off the fibrosis process that may be caused due to excessive secretion of collagen, cellular growth, and differentiation. RG6354 works by healing the fibrotic tissue, unlike other therapies, which tend to direct a single target inhibition.
Tyvaso (inhaled treprostinil): United Therapeutics
Tyvaso (treprostinil) is a prostacyclin mimetic approved for the treatment of pulmonary arterial hypertension (PAH; WHO Group 1) and pulmonary hypertension associated with interstitial lung disease (PH-ILD; WHO Group 3) to improve exercise ability. The company is currently evaluating Tyvaso in an ongoing worldwide Phase III clinical trial named TETON 1 for the treatment of patients with IPF.
Products detail in the report?
List of products to be continued in the report?
Idiopathic Pulmonary Fibrosis Market Outlook
Idiopathic pulmonary fibrosis (IPF) is a lung disorder with scarring of the lungs from an unknown cause. It is one of the most aggressive forms of idiopathic interstitial pneumonia (IIPs). The majority of patients are male, and the risk of IPF for someone aged 75?years is eight times that of someone aged 45-54?years. It is reported that without treatment, the median survival in patients with IPF is 2-4 years after diagnosis.
There are two antifibrotic agents approved for use in IPF. These are pirfenidone and nintedanib (tyrosine kinase inhibitors). Both drugs are known to slow the disease progression but not significantly impact mortality. For this reason, early initiation of therapy is recommended. Further studies have also decreased exacerbations of IPF with these drugs. Serial monitoring of liver function tests is recommended while on either drug. The most common side effect reported with nintedanib is diarrhea and pirfenidone rash, photosensitivity, and gastrointestinal discomfort. Gastrointestinal side effects are the most common reason for discontinuing both drugs. According to survey reports, most European physicians are either unaware of these antifibrotic drugs or believe in the wait and watch strategies during the progression of IPF. It was found that only 71% of mild IPF diagnosed patients, 41% of moderate IPF diagnosed patients, and around 60% of severe IPF diagnosed patients receive treatment in European counties.
Over the years, some drugs have been investigated to treat IPF cases. Drug molecules such as Pamrevlumab, PRM-151, and Inhaled Treprostinil are in Phase III and have shown positive results in previous clinical studies. In addition to this, some candidates are in Phase II and early stages.
Key Findings
- The market size of Idiopathic Pulmonary Fibrosis in seven major markets was USD 3,167 million in 2021, which is further expected to increase by 2032 at a Compound Annual Growth Rate (CAGR) of 6.6% for the study period (2019-2032).

- The expected launch of potential therapies may increase market size in the coming years, assisted by an increase in the diagnosed prevalent population of Idiopathic Pulmonary Fibrosis.
- Upcoming therapies such as Pamrevlumab, PRM-151 (pentraxin-2, RG6354), Tyvaso (treprostinil), BI 1015550, and others has the potential to create a significant positive shift in the Idiopathic Pulmonary Fibrosis market size.
- The United States accounts for the largest market size of Idiopathic Pulmonary Fibrosis, with approximately USD 2,321 million in 2021 and is expected to increase by 2032 at a Compound Annual Growth Rate (CAGR) of 6.3% for the study period (2019-2032).
- The total market size for Idiopathic Pulmonary Fibrosis in the EU-5 was USD 693 million in 2021, which is anticipated to grow at a CAGR of 7.8%.
- Japan accounted for USD 153 million market share in 2021 i.e. 5% of the total market size in the 7MM.

The United States Market Outlook

This section provides the total Idiopathic Pulmonary Fibrosis market size and market size by therapies in the United States.

EU-5 Market Outlook

The total Idiopathic Pulmonary Fibrosis market size and market size by therapies in Germany, France, Italy, Spain, and the United Kingdom are provided in this section.

Japan Market Outlook

The total Idiopathic Pulmonary Fibrosis market size and market size by therapies in Japan are provided.

Idiopathic Pulmonary Fibrosis Drugs Uptake

This section focuses on the rate of uptake of the potential drugs recently launched in the Idiopathic Pulmonary Fibrosis market or expected to get launched in the market during the study period 2019-2032. The analysis covers the Idiopathic Pulmonary Fibrosis market uptake by drugs; patient uptake by therapies; and sales of each drug.

This helps in understanding the drugs with the most rapid uptake, reasons behind the maximal use of new drugs and allows, the comparison of the drugs based on market share and size which again will be useful in investigating factors important in market uptake and in making financial and regulatory decisions.

Idiopathic Pulmonary Fibrosis Development Activities

The report provides insights into different therapeutic candidates in Phase II, and Phase III stages also analyze key players involved in developing targeted therapeutics.

Pipeline Development Activities

The report covers the detailed information of collaborations, acquisition, and merger, licensing, and patent details for Idiopathic Pulmonary Fibrosis emerging therapies.

Reimbursement Scenario in Idiopathic Pulmonary Fibrosis

OFEV and ESBRIET have Medicare and commercial coverage on national plans. For OFEV there are programs designed to help with the out-of-pocket cost for patients with IPF in the United States. These programs include The OFEV Commercial Copay Program, The BI Cares Foundation, and some third-party financial assistance. While for ESBRIET programs such as ESBRIET Co-pay Program, Genentech Patient Foundation, and support from independent co-pay assistance foundations are available.

Competitive Intelligence Analysis

We perform competitively and market Intelligence analysis of the Idiopathic Pulmonary Fibrosis market by using various competitive intelligence tools that include-SWOT analysis, PESTLE analysis, Porter's five forces, BCG Matrix, Market entry strategies, etc. The inclusion of the analysis entirely depends upon the data availability.

Scope of the Report

- The report covers the descriptive overview of Idiopathic Pulmonary Fibrosis, explaining its signs, symptoms, risk factors and currently available therapies.
- Comprehensive insight has been provided into the Idiopathic Pulmonary Fibrosis epidemiology and treatment.
- Additionally, an all-inclusive account of both the current and emerging therapies for Idiopathic Pulmonary Fibrosis is provided, along with the assessment of new therapies, which will have an impact on the current treatment landscape.
- A detailed review of the Idiopathic Pulmonary Fibrosis market; historical and forecasted is included in the report, covering the 7MM drug outreach.
- The report provides an edge while developing business strategies, by understanding trends shaping and driving the 7MM

Idiopathic Pulmonary Fibrosis market.

Report Highlights

- The robust pipeline with novel MOA and oral ROA and increasing diagnosed prevalence will positively drive the Idiopathic Pulmonary Fibrosis market.
- The companies and academics are working to assess challenges and seek opportunities that could influence Idiopathic Pulmonary Fibrosis R&D. The therapies under development are focused on novel approaches to treat/improve the disease condition.
- Major players are involved in developing therapies for Idiopathic Pulmonary Fibrosis. The launch of emerging therapies will significantly impact the Idiopathic Pulmonary Fibrosis market.
- Our in-depth analysis of the pipeline assets across different stages of development (Phase III and Phase II), different emerging trends, and comparative analysis of pipeline products with detailed clinical profiles, key cross-competition, launch date along with product development activities will support the clients in the decision-making process regarding their therapeutic portfolio by identifying the overall scenario of the research and development activities.

Idiopathic Pulmonary Fibrosis Report Insights

- Patient Population.
- Therapeutic Approaches.
- Idiopathic Pulmonary Fibrosis Pipeline Analysis.
- Idiopathic Pulmonary Fibrosis Market Size and Trends.
- Market Opportunities.
- Impact of upcoming Therapies.

Idiopathic Pulmonary Fibrosis Report Key Strengths

- 11-Years Forecast.
- The 7MM Coverage.
- Idiopathic Pulmonary Fibrosis Epidemiology Segmentation.
- Key Cross Competition.
- Highly Analyzed Market.
- Drugs Uptake.

Idiopathic Pulmonary Fibrosis Report Assessment

- Current Treatment Practices.
- Unmet Needs.
- Pipeline Product Profiles.
- Market Attractiveness.
- Market Drivers and Barriers.
- SWOT analysis.

Key Questions

Market Insights:

- What was the Idiopathic Pulmonary Fibrosis market share (%) distribution in 2019 and how it would look like in 2032?
- What would be the Idiopathic Pulmonary Fibrosis total market size as well as market size by therapies across the 7MM during the forecast period (2022-2032)?
- What are the key findings pertaining to the market across the 7MM and which country will have the largest Idiopathic Pulmonary Fibrosis market size during the forecast period (2022-2032)?
- At what CAGR, the Idiopathic Pulmonary Fibrosis market is expected to grow at the 7MM level during the forecast period (2022-2032)?
- What would be the Idiopathic Pulmonary Fibrosis market outlook across the 7MM during the forecast period (2022-2032)?
- What would be the Idiopathic Pulmonary Fibrosis market growth till 2032 and what will be the resultant market size in the year 2032?
- How would the market drivers, barriers, and future opportunities affect the market dynamics and subsequent analysis of the

associated trends?
Epidemiology Insights:
- What is the disease risk, burden, and unmet needs of Idiopathic Pulmonary Fibrosis?
- What is the historical Idiopathic Pulmonary Fibrosis patient pool in the United States, EU5 (Germany, France, Italy, Spain, and the UK), and Japan?
- What would be the forecasted patient pool of Idiopathic Pulmonary Fibrosis at the 7MM level?
- What will be the growth opportunities across the 7MM with respect to the patient population pertaining to Idiopathic Pulmonary Fibrosis?
- Out of the above-mentioned countries, which country would have the highest population of Idiopathic Pulmonary Fibrosis during the forecast period (2022-2032)?
- At what CAGR the population is expected to grow across the 7MM during the forecast period (2022-2032)?
Current Treatment Scenario, Marketed Drugs, and Emerging Therapies:
- What are the current options for the treatment of Idiopathic Pulmonary Fibrosis along with the approved therapy?
- What are the current treatment guidelines for the treatment of Idiopathic Pulmonary Fibrosis in the US and Europe?
- What are the Idiopathic Pulmonary Fibrosis marketed drugs and their MOA, regulatory milestones, product development activities, advantages, disadvantages, safety, and efficacy, etc.?
- How many companies are developing therapies for the treatment of Idiopathic Pulmonary Fibrosis?
- How many emerging therapies are in the mid-stage and late stages of development for the treatment of Idiopathic Pulmonary Fibrosis?
- What are the key collaborations (Industry-Industry, Industry-Academia), mergers and acquisitions, licensing activities related to the Idiopathic Pulmonary Fibrosis therapies?
- What are the recent novel therapies, targets, mechanisms of action, and technologies developed to overcome the limitation of existing therapies?
- What are the clinical studies going on for Idiopathic Pulmonary Fibrosis and their status?
- What are the key designations that have been granted for the emerging therapies for Idiopathic Pulmonary Fibrosis?
- What are the 7MM historical and forecasted market of Idiopathic Pulmonary Fibrosis?
Reasons to buy
- The report will help developing business strategies by understanding trends shaping and driving Idiopathic Pulmonary Fibrosis.
- To understand the future market competition in the Idiopathic Pulmonary Fibrosis market and an Insightful review of the key market drivers and barriers.
- Organize sales and marketing efforts by identifying the best opportunities for Idiopathic Pulmonary Fibrosis in the US, Europe (Germany, Spain, Italy, France, and the United Kingdom), and Japan.
- Identification of strong upcoming players in the market will help in devising strategies that will help in getting ahead of competitors.
- Organize sales and marketing efforts by identifying the best opportunities for the Idiopathic Pulmonary Fibrosis market.
- To understand the future market competition in the Idiopathic Pulmonary Fibrosis market.

Table of Contents:

Idiopathic Pulmonary Fibrosis - Market Insight, Epidemiology And Market Forecast - 2032

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