SCOTTS INTERNATIONAL

Antibiotics Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 150 pages | Mordor Intelligence

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Report description:

The antibiotics market generated USD 47,150.78 million in the base year and is expected to reach USD 63,017.22 million over the forecast period.

The outbreak of COVID-19 impacted the antibiotics market. During the initial phase of the pandemic, the demand for antibiotics significantly increased for treating COVID-19. For instance, in March 2020, Pfizer announced positive data by using azithromycin (Zithromax) and hydroxychloroquine in a coronavirus (COVID-19) clinical trial, performed in France. Following these clinical trials, azithromycin became a widely used drug for treating COVID-19. Furthermore, according to a July 2021 NCBI research article and as per the Mordor Intelligence analysis, COVID-19 contributed to about 216.0 million excess doses of non-CAF (child-appropriate formulations) of antibiotics in total and 38 million extra doses of azithromycin between June and September 2020 in India. Therefore, the market witnessed high growth during the pandemic due to such high demand for antibiotics. However, it is expected to observe stable growth after the pandemic.

The emergence of Anti-MRSA/VRE drugs, the increasing burden of infectious diseases, the vulnerable aging population, and the need for effective and newer antibiotics are driving the market growth. For instance, according to the October 2022 report of the WHO, around 10.6 million people suffered from TB in 2021. It was an increase of 4.5% from 2020, and 1.6 million people died from TB across the globe. The same source also reported that the burden of drug-resistant TB (DR-TB) increased by 3.0% between 2020 and 2021, with 450000 new cases of rifampicin-resistant TB (RR-TB) in 2021. Furthermore, one-third of the cases were reported from eight countries, including India, China, Indonesia, Philippines, Pakistan, Nigeria, Bangladesh, and South Africa. Therefore, such a high prevalence of infectious diseases may propel the demand for antibiotics, further surging market growth.

The urbanization and destruction of natural habitats, climate change, and changing ecosystems are three major factors contributing to the high rate of infectious diseases in all age groups. For instance, as per the UNICEF data published in August 2022, there were more than 1,400 cases of pneumonia per 100,000 children, or 1 case in 71 children each year, globally, with the highest incidence occurring in South Asia (2,500 cases per 100,000 children) and West and Central Africa (1,620 cases per

100,000 children). Similarly, as per the ERS journal of 2021, it was estimated that around 36,580,965 Europeans suffered from COPD in 2020. According to Mordor Intelligence analysis, approximately 49,453,852 Europeans will suffer from COPD in 2050. Antibiotics are widely used for treating various types of diseases. Therefore, such a high disease prevalence is anticipated to impact the market growth over the forecast period positively.

However, factors such as antibiotic resistance and fewer companies involved in active research are expected to impede the growth of the antibiotics market over the forecast period.

Antibiotics Market Trends

Cephalosporins is Expected to Witness Considerable Growth Over the Forecast Period

Cephalosporins are a beta-lactam antibiotic that inhibits peptidoglycan synthesis in the bacterial cell wall. It manages a wide range of infections from gram-positive and gram-negative bacteria. These antibiotics commonly treat pneumonia, skin infections, ear infections, meningitis, upper respiratory tract infections, etc.

The first cephalosporin was discovered in 1945. With time, many advancements were made to improve the cephalosporin efficacy against various bacteria. Each upgrade was termed a generation. Currently, there are five generations of cephalosporins. Due to their broad applicability and flexible route of administration (oral or intravenous), cephalosporins are prescribed and used widely worldwide, which is the major driving factor for the segment. In addition, with the growing incidence of infection, the companies are evolving their product offerings, launching new ones, and adopting merger and acquisition strategies to develop new product lines. For instance, in October 2021, Novartis' subsidiary Sandoz acquired GlaxoSmithKline's (GSK) cephalosporin antibiotics business for USD 500 million. The transaction has granted Sandoz the rights to GSK's Zinnat, Zinacef, and Fortum brands, sold in more than 100 markets.

The high efficiency of cephalosporin in combating various infections is also expected to propel segment growth. For instance, according to the October 2021 NCBI research study, antibiotics use for COVID-19 patients has shown considerable therapeutic benefits. It is evident in patients with severe pneumonia and those receiving glucocorticoids or other immunosuppressant therapeutics. The study also stated ceftazidime and cefepime demonstrated good inhibitory activity toward COVID-19. It also concluded ceftazidime and cefepime repurposing are highly effective for moderate and severe COVID-19 patient symptomatic improvement.

Therefore, owing to these factors mentioned above, the cephalosporin segment is expected to witness considerable growth over the forecast period.

North America Expected to Witness Significant Growth Over the Forecast Period

North America is expected to dominate the antibiotics market over the forecast period. The growth is due to factors such as the high antibiotics demand and consumption in the region due to the high burden of infectious diseases and the growing aging population. For instance, according to the October 2022 CDC report, in 2021, more than 7,174 new cases of TB were reported in the US. The same source also noted that the prevalence of TB was to be highest among Hispanic or Latino persons, who accounted for about 30.0% of the total TB cases reported in the country. Thus, such a high prevalence of infectious diseases is expected to drive the demand for antibiotics in the region, thereby propelling market growth.

Key product launches, high concentration of market players or manufacturer's presence, acquisitions and partnerships among significant players, and the high prevalence of diseases in the US are some of the factors driving the growth of the antibiotics market in the country. For instance, according to the study published by researchers from the University of Missouri in October

2021, pneumonia was reported to be 24.8 cases per 10,000 adults in the United States. Similarly, according to the November 2021 article of the CDC, the common cold affects millions of people in the US each year. Adults have 2-3 colds yearly, and children get even more. Thus, due to the country's high burden of bacterial infectious diseases, the US is expected to hold a significant share of the antibiotics market in the North American region.

Therefore, the studied market growth is anticipated in the North America Region due to the aforementioned factors.

Antibiotics Market Competitor Analysis

The antibiotics market is highly fragmented and consists of several major players. In terms of market share, few significant players currently dominate the market. The competitive landscape includes an analysis of a few international and local companies that hold market shares and are well known, including Johnson & Johnson, Pfizer PLC, Bayer AG, Novartis AG, and Abbott Inc., among others.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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