

## **Asthma and Copd Drugs Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

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### **Report description:**

The asthma and COPD drugs market is expected to witness a CAGR of 4.6% during the forecast period.

According to a research study by Jose Luis Izquierdo et al., published in the European Respiratory Journal, March 2021, allergy-related factors such as rhinitis and eczema were less common in asthmatic patients with COVID-19. There was a high prevalence of these comorbidities observed in patients with COVID-19 who required hospital admission. Furthermore, the use of inhaled corticosteroids (ICS) was lower in patients who required hospitalization due to COVID-19 compared to non-hospitalized patients (48.3% versus 61.5%). Although patients treated with biologics showed increased severity and more comorbidities at the ear, nose, and throat levels, COVID-19-related hospitalizations in these patients were relatively low (0.23%). Thus, patients with asthma and COVID-19 were older and at increased risk due to comorbidity-related factors. Inhaled corticosteroids (ICS) and biologics are generally safe and may be associated with a protective effect against severe COVID-19 infection. Chronic obstructive pulmonary disease (COPD) patients have an increased risk of severe pneumonia and poor outcomes when they develop COVID-19. This may be related to poor underlying lung reserves or increased expression of ACE-2 receptors in small airways. According to a research study by Janice M. Leung et al., published in the European Respiratory Journal, June 2020, there is increasing evidence that COPD may be a risk factor for more severe COVID-19 disease. An analysis of comorbidities in 1,590 COVID-19 patients across China found that COPD carried an odds ratio of 2.681 for ICU admission, mechanical ventilation, or death, even after adjustment for age and smoking. About 62.5% of severe cases had a history of COPD (compared with only 15.3% in non-severe cases), and 25% of those who died were COPD patients (compared with only 2.8% in those who survived). Thus, the COVID-19 pandemic had a significant impact on the asthma and COPD drugs market.

Some of the factors that are driving the market growth include an increase in the incidence and prevalence of asthma and COPD, technological advancements, and a growing geriatric population.

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Chronic obstructive pulmonary disease (COPD) is a common, preventable, and treatable chronic lung disease that affects men and women worldwide. According to the World Health Organization (WHO) 2021 factsheet, COPD is the third-leading cause of death worldwide, causing 3.23 million deaths in 2019. Over 80% of these deaths occurred in low- and middle-income countries (LMIC). Moreover, the increasing geriatric population globally is boosting the market growth. According to the World Ageing 2020 report, in 2020, there were around 727 million people aged 65 years or more in the world. The number of older persons is projected to double to 1.5 billion in 2050. Globally, the share of the population aged 65 years or over increased from 9.3% in 2020 to reach 16% by 2050. Hence, owing to the fact that asthma is a widely prevalent disease found in people over the age of 65, the growing geriatric population is expected to drive the market growth over the forecast period.

In addition, technological advancements are anticipated to provide the market with lucrative opportunities. Limitations of traditional treatments, such as the late onset of action and low efficacy, are projected to encourage the development of novel targeted drugs, thereby boosting the market. For instance, in February 2021, Sanofi, in collaboration with Regeneron Pharmaceuticals, initiated a Phase III clinical trial to assess the efficacy and safety of itepekimab on the annualized rate of acute moderate-or-severe COPD exacerbations in former smokers with moderate-to-severe chronic obstructive pulmonary disease (COPD). The trial is expected to be completed in July 2024.

The market players are adopting various strategies such as product launches, developments, collaborations, acquisitions, and expansions to increase their market shares. For instance, in July 2020, Novartis AG received approval from the European Commission (EC) for Enerzair Breezhaler (indacaterol acetate, glycopyrronium bromide, and mometasone furoate [IND/GLY/MF]) as a maintenance treatment of asthma in adult patients not adequately controlled with a maintenance combination of a long-acting beta<sub>2</sub>-agonist (LABA) and a high-dose of an inhaled corticosteroid (ICS) who experienced one or more asthma exacerbations in the previous year. However, factors such as stringent government regulations for product approvals and side effects associated with drugs are expected to impede the market growth over the forecast period.

#### Asthma & COPD Drugs Market Trends

##### The Asthma Segment is Expected to Hold a Significant Market Share Over the Forecast Period

Asthma is considered one of the world's most common diseases affecting the population and a life-threatening condition affecting patients' regular breathing. It is a persistent condition that stretches and narrows the air passages of the lungs, causing constant assaults of breathlessness, bronchospasm, and reversible obstruction of airflow. Moreover, there is a large rise in the consumption of cigarettes, which contributes to asthma symptoms. In addition, the rise in industrialization has also contributed to an increase in the number of cases of asthma, which, over the forecast era, may drive the demand for asthma drugs.

Globally, the COVID-19 outbreak and the measures in response to it have had significant impacts on asthma control among children. According to a research study by Yuanmin Jia et al., published in the British Medical Journal (BMJ) in May 2020, children with asthma were advised to continue good asthma management and take prescribed asthma medications as normal. Additionally, according to a research study by Hashim T. et al., published in the Journal of Medical Virology, March 2021, globally, the COVID-19 pandemic had a bad impact on the mental health of asthmatic patients, especially at the beginning of the pandemic in 2020. However, since asthmatic patients were thought to be more vulnerable to the disease than others, many of them followed the preventive measures and committed to the quarantine rules to avoid infection. Airways and lung parenchyma are the main targets of the SARS-CoV-2 virus, and concerns were raised regarding the outcome in patients with chronic respiratory diseases such as asthma. According to a research study by P. Pignatti et al., published in the International Journal of Tuberculosis and Lung Disease, September 2020, patients with asthma in Northern Italy demonstrated a low occurrence of SARS-CoV-2 infection and a low number of asthma exacerbations. Most of the patients succeeded in following their asthma prescriptions despite the lockdown.

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The substantial increase in prevalence and incidence of asthma has led to an increase in the patient population, which has, in turn, increased the demand for these drugs. According to the World Health Organization (WHO) 2021 factsheet, asthma is a major non-communicable disease (NCD), affecting both children and adults. Globally, it affected an estimated 262 million people in 2019 and caused 461,000 deaths. Enormous investments in the study of asthma drugs accompanied by strategic collaborations such as mergers and acquisitions are the business strategies followed by the major companies in the market.

For instance, in October 2019, the US Food and Drug Administration (FDA) approved the self-administration of AstraZeneca's asthma drug Fasenra, a pre-filled, single-use auto-injector. In March 2021, GlaxoSmithKline PC, in collaboration with Iqvia Pty Ltd, initiated a Phase III clinical trial to evaluate the efficacy and safety of GSK3511294 (Depemokimab) in adult and adolescent patients with severe uncontrolled asthma. The trial is expected to be completed in October 2023. Similarly, in February 2021, AstraZeneca PLC, in collaboration with Amgen Inc., initiated a Phase I clinical trial to evaluate the pharmacokinetic (PK) profile of a single subcutaneous (SC) dose of tezepelumab in children aged 5 to 11 years with asthma. The trial is expected to be completed in September 2021. Thus, the aforementioned factors are expected to drive the segment growth over the forecast period.

#### North America is Expected to Hold a Significant Market Share Over the Forecast Period

The North American region is expected to dominate the asthma and COPD drugs market during the forecast period. This growth can be attributed to the rising incidence of diseases such as COPD and asthma, the aging population, increasing research and development activities, and the presence of key market players.

In the United States, asthma is more common in adult women than adult men. According to the Centers for Disease Control and Prevention 2020 report, in the United States, approximately 25 million Americans have asthma. This equals to about 1 in 13 Americans, including 8% of adults and 7% of children. About 20 million US adults aged 18 years and over have asthma. Similarly, asthma is a major public health concern in Canada. As a lifelong respiratory illness, asthma affects the work productivity, quality of life, mental health, and psychological well-being of the Canadian population. In Canada, over 3.8 million individuals had asthma in 2019, as per Canada's 2019 annual asthma survey report. The high number of patients affected by asthma increases the demand for drugs for the treatment of the target disease, thereby boosting the growth of this region.

Moreover, the rise in the number of initiatives undertaken by government and non-government organizations is increasing the overall revenue. For instance, CDC's National Asthma Control Program (NACP) provides funds for educating asthma-affected patients. Such initiatives are likely to increase awareness about asthma, which will increase the adoption of drugs in the treatment of asthma, leading to verticle growth.

In addition, the local presence of key pharmaceutical players, advanced healthcare infrastructure, and increasing research and development activities in the development of novel therapies are boosting the market growth. For instance, in March 2021, in Mexico and the United States, AstraZeneca PLC started a Phase III clinical trial to assess the efficacy and safety of budesonide/glycopyrronium/formoterol inhalers in adults and adolescents with severe asthma inadequately controlled with the standard of care. The trial is expected to be completed in September 2023. In July 2021, AstraZeneca's Biologics License Application (BLA) for tezepelumab was accepted and granted Priority Review for the treatment of asthma by the United States Food and Drug Administration (FDA). Tezepelumab is being developed by AstraZeneca in collaboration with Amgen Inc. Thus, the aforementioned factors are expected to drive the market growth over the forecast period.

#### Asthma & COPD Drugs Market Competitor Analysis

The asthma and COPD drugs market is consolidated and competitive. The industry is competitive in nature, with the key players involved in mergers and acquisitions, new product developments, collaborations and partnerships, and expansion strategies to

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augment market penetration. Companies like GlaxoSmithKline PLC, Merck & Co. Inc., AstraZeneca PLC, Boehringer Ingelheim GmbH, and Novartis AG, among others, hold the substantial market share.

Additional Benefits:

- <li> The market estimate (ME) sheet in Excel format </li>
- <li> 3 months of analyst support </li>

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