

## **Gastrointestinal Therapeutics Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

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### **Report description:**

The gastrointestinal therapeutics market is expected to register a CAGR of 6.8% during the forecast period.

The COVID-19 pandemic created a worldwide disruption of supply chains, and the healthcare sector was affected badly. But the gastrointestinal therapeutics market showed a stable growth due to the correlation between Covid-19 and Gastrointestinal (GI) patients. A research study "COVID-19 and Gastrointestinal Disease: Implications for the Gastroenterologist", published in Digestive Diseases Journal in March 2021, found that the digestive system may be affected by the SARS-CoV-2 virus, and those with the pre-existing disease are at greatest risk of adverse outcomes. Some repurposed drugs used against COVID-19 can cause or aggravate some of the COVID-19-related gastrointestinal symptoms and can also induce liver injury. In addition, according to the research "The mechanism and treatment of gastrointestinal symptoms in patients with COVID-19", published in the American Journal of Physiology in August 2020, COVID-19 Cases with gastrointestinal symptoms are more likely to be complicated by liver injury and acute respiratory distress syndrome (ARDS), If these are not treated in time, coma and circulatory failure may occur.

The major factors that contribute to the growth of the gastrointestinal therapeutics market include the increasing prevalence of gastrointestinal diseases due to unhealthy dietary habits, additional numbers of clinical trials with accurate results, increasing healthcare expenditure, and growth in the geriatric population.

A wide range of new generation therapeutics is found targeting which includes novel small molecules and cellular therapy. Other driving factors include the rising surgical treatments and hospitalizations due to GI diseases and increasing R&D investments by biopharmaceutical companies in developing biologics and biosimilars. As of May 2021, there were around 6,443 ongoing clinical trials related to gastrointestinal diseases across different phases of development, as per the National Clinical Trial (NCT) registry. The positive outcomes from these studies can create new opportunities for effective therapeutics over the forecast period.

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There is a rising trend towards the development of effective therapeutics products by the market players. The companies are majorly expanding their pipeline and product portfolio through collaborations with specialized companies in gastrointestinal therapeutics. For instance, in January 2020, Ayvakit (avapritinib) by Blueprint Medicines Corporation received approval from the US Food and Drug Administration (FDA) for the treatment of adults with unresectable (unable to be removed with surgery) or metastatic (when cancer cells spread to other parts of the body) gastrointestinal stromal tumor (GIST). Again, on May 20, Qinlock (ripretinib) tablets manufactured by Deciphera Pharmaceuticals Inc. received the US Food and Drug Administration (FDA) approval as the first new drug specifically approved as a fourth-line treatment for advanced gastrointestinal stromal tumor (GIST).

However, risk factors, such as those related to the physiological, behavioral, psychosocial, and socio-environmental aspects, restrict the populations from reporting the diseases early, which reflects the low awareness and the economic burden. These risk factors and the increasing number of patent expirations restrict the growth of the gastrointestinal therapeutics market.

#### Gastrointestinal Therapeutics Market Trends

##### The Ulcerative Colitis Segment is Found to Witness a Healthy Growth Rate Over the Forecast Period

The growth of the ulcerative colitis segment can be attributed to the easy availability of drugs in the market to treat this condition. The segment is also anticipated to grow at a considerable rate owing to the high clinical urgency to curb the growing prevalence of ulcerative colitis. This high prevalence is due to poor prognosis and consumption of unhealthy food, which may result in a high probability of disease recurrence.

According to a research study by Shinji Okabayashi et al., published in the Journal of the Anus, Rectum, and Colon in January 2020, in Japan, there were around 180,000 patients with ulcerative colitis. In addition, in Latin America, the incidence and prevalence of ulcerative colitis (UC) have been reported to be rising in newly industrialized regions. According to a research study by Paulo Gustavo Kotze et al., published in Therapeutic Advances in Gastroenterology Journal in July 2020, the incidence and prevalence of ulcerative colitis (UC) in Latin America were between 0.04 to 8.00/100,000 and 0.23 to 76.1/100,000, respectively. Therefore, the research and studies show the increasing incidence and prevalence of the Ulcerative Colitis condition, and this is generating demand for the segment.

Increasing research and development activities is also boosting market growth. According to the National Clinical Trial (NCT) registry, as of May 2021, there are around 245 ongoing clinical trials related to ulcerative colitis across different phases of development. The positive outcomes from these studies can expect new effective therapeutics for ulcerative colitis in the coming years.

In addition, Takeda Pharmaceuticals, Janssen Pharmaceuticals, and Pfizer are among the major global companies that have established themselves with their products for the treatment of inflammatory ulcerative colitis. Moreover, the increasing involvement of key players in product development related to the field is anticipated to drive the segment growth. For instance, in March 2019, Johnson & Johnson announced the new clinical data from its Phase III UNIFI study showing positive results of STELARA in adults suffering from moderate to severe ulcerative colitis.

The novel launch of products from these strong pipelines and increased research and development in the segment is anticipated to propel studied market growth over the forecast period.

##### North America Dominates the Market and is Expected to do Same in the Forecast Period

Some of the factors that are driving the market growth in the North American region include technological advancements, a

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growing number of gastrointestinal diseases, a rising geriatric population and obese population, and increasing research and development activities with the presence of key market players.

The COVID-19 infection is noted to be more severe in patients with co-morbid conditions, those who are immunosuppressed, malnourished, and immunocompromised. Inflammatory bowel disease (IBD), which includes Crohn's disease and ulcerative colitis, is a chronic remitting and relapsing disorder with intestinal and extraintestinal manifestation. Inflammatory bowel disease (IBD) patients are often malnourished and on immunosuppressive medications, and there is a hypothetical concern that IBD patients are at substantial risk of COVID-19 infection.

According to a research study by Maliha Naseer published in the World Journal of Meta-Analysis in October 2020, in the United States, the management of inflammatory bowel disease (IBD) patients was often complex and posed unique challenges for gastroenterologists during the COVID-19 pandemic. The study results found that, during the COVID-19 pandemic 2020, IBD patients continued their medications and followed universal precautions, i.e., masks, hand and respiratory hygiene, and avoidance of health care facilities and public toilets as the general population. Among IBD patients of older age, having active disease and co-morbid conditions, are risk factors for a severe COVID-19 infection.

The market players have adopted various strategies such as investment in research and development, product portfolio expansion, development of novel ulcerative colitis and Crohn's disease therapeutics, mergers, and acquisitions to establish a strong distribution network. For instance, in April 2019, Salix Pharmaceuticals (Bausch Health Companies Inc.) entered into an exclusive license agreement with Mitsubishi Tanabe Pharma to commercialize and develop late-stage investigational S1P modulators for the treatment of inflammatory bowel disease.

Thus, owing to numerous product launches and strategic steps taken by major players present in the country is expected to drive market growth in North America during the forecast period.

#### Gastrointestinal Therapeutics Market Competitor Analysis

The gastrointestinal therapeutics market is moderately competitive. These market players have extensively employed competition sustainability strategies such as new product development and regional and distribution channel expansion to gain a higher share in the market. Moreover, increased focus on refining operation and supply chain management has facilitated key players to maintain a competitive edge. Some of the market players include Abbott Laboratories, Abbvie Inc., AstraZeneca PLC, Bayer AG, GlaxoSmithKline PLC, Janssen Pharmaceuticals Inc. (Johnson & Johnson), Pfizer Inc., AbbVie Inc., Takeda Pharmaceutical Company Limited, Bausch Health Companies Inc. (Salix Pharmaceuticals Inc.), Boehringer Ingelheim GmbH, and Cipla Inc., among others.

#### Additional Benefits:

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

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