

Xerostomia (Dry Mouth Disease) Therapeutics Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 117 pages | Mordor Intelligence

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Report description:

The Xerostomia (Dry Mouth Disease) Therapeutics market is projected to register a CAGR of 4.25% during the forecast period (2022-2027).

The COVID-19 pandemic has posed new challenges in every aspect of an individual's life, including oral health. Dry mouth has become one of the most common problems that patients from all walks of life are dealing with. COVID-19 has also been linked to dry mouth as a symptom. According to the article titled "Xerostomia (dry mouth) in patients with COVID-19: a case series" published in April 2021, dry mouth appeared in 60% of cases 3-4 days before as a prodromal symptom and in others, simultaneously or 1-2 days after the onset of other symptoms. In the majority of cases, dry mouth improved over time after beginning treatment. The study further stated that in COVID-19 patients, xerostomia may develop before the onset of the common symptoms. Such studies demonstrate the frequency of the condition in COVID-19 patients and hence suggest that the demand for therapeutics for dry mouth disease is anticipated to grow in the near future. Thus, COVID-19 is expected to have a pronounced effect on the growth of the market.

Xerostomia commonly referred to as "dry mouth syndrome", is a result of reduced or absent salivary flow, producing mucosal dryness. The increase in radiation therapy and chemotherapy is likely to lead to an increased incidence of xerostomia, which is estimated to predominantly drive the xerostomia therapeutics market. Other factors driving the market growth include increasing usage of prescription medicines; easy availability and cost-effectiveness of medicines; a growing geriatric population base; and increasing prevalence of diseases, such as Sjogren's syndrome, HIV, diabetes, and Alzheimer's disease, among other diseases.

Additionally, the geriatric population is expected to have a significant impact on the market studied. For instance, according to the World Population Prospect, 2022, globally, in 2022, there were 771 million people aged 65 years or over, and it is projected to

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reach 994 million by 2030 and 1.6 billion by 2050. Elderly people frequently experience xerostomia, which is typically associated with reduced salivary gland activity. The use of drugs, chronic illnesses, and radiation therapy to the head and neck region have all been implicated as causes of xerostomia in the elderly population.

Furthermore, according to the International Diabetes Federation, as of 2021, there are 536.6 million people aged 20 -79 years around the world living with diabetes, and this number is expected to reach 783.7 million by 2045. Diabetes is often associated with dry mouth syndrome. For instance, as per the article titled "Xerostomia, Salivary Flow, and Oral Health Status Among Saudi Diabetic Patients: A Comparative Cross-Sectional Study" published in the National Library of Medicine in November 2021, Xerostomia was one of the symptoms of diabetes that was most frequently reported. In diabetic patients, xerostomia can occur anywhere between 12.5% and 76.4% of the time. Further, the study detailed that the data from the cross-sectional investigation of 50 diabetic patients in Saudi Arabia was collected, wherein 52% of controls and 60% of the diabetic participants both exhibited xerostomia. Thus, the growing burden of diseases leading to xerostomia is expected to drive the growth of the market.

Thus, the market is expected to experience significant growth over time. However, factors, such as lack of awareness and unavailability of effective treatment, are likely to hinder the usage of xerostomia therapeutics products and can act as a restraining factor for the xerostomia therapeutics market.

Xerostomia (Dry Mouth Disease) Therapeutics Market Trends

Artificial Saliva/Saliva Substitutes Segment Expected to Dominate the Market Over the Forecast Period

The reduction of saliva in the mouth can lead to tooth decay, mouth infections, an altered sense of taste or smell, difficulty in swallowing, pain, and many other complications. Artificial saliva is a liquid or aerosol product that is sprayed into the mouth. They are designed to moisten and relieve the pain and discomfort of chronic dry mouth, especially with regular use. Many artificial saliva sprays and gels claim to work for up to two hours, and many users require more frequent applications to maintain moisture in the mouth, which can greatly interfere with sleep and daily activity. Several saliva sprays and gels also have a reputation for strong and unpleasant flavors, though a recent increase in the use of naturally sweet xylitol has led to the availability of better alternatives.

Factors such as the growing burden of dry mouth disease and increasing research studies are propelling the growth of the market segment. For instance, the article titled "Artificial Saliva in Diabetic Xerostomia (ASDIX): Double Blind Trial of Aldiamed Versus Placebo" published in July 2020, concluded that the use of Aldiamed spray was shown to be more effective than a placebo in the treatment of xerostomia in type 1 and type 2 diabetes. Such studies demonstrate that saliva substitutes are effective for the treatment of xerostomia. The mentioned source also reported that the dry mouth symptom is one of the most common oral complaints in patients with diabetes mellitus. Moreover, the prevalence of xerostomia and hyposalivation has been reported to increase with age. The study also projects that there may be increasing demand for saliva substitutes in the coming years as the burden of diabetes mellitus and the geriatric population is expected to show rapid growth in the near future.

Hence, owing to the aforementioned factors, along with the rising disease burden and availability of over-the-counter artificial saliva products, the segment is expected to register steady growth during the forecast period.

Asia-Pacific is Expected to be the Fastest Growing Region Over the Forecast Period

The Asia-Pacific region is expected to register lucrative growth over the forecast period due to factors such as growing healthcare expenditure, an increase in initiatives for raising awareness, and the rising prevalence of diseases such as diabetes, HIV, cancer, and Parkinson's disease that cause dry mouth conditions.

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Cancer rates are increasing drastically in the Asia-Pacific region. For instance, according to GLOBOCAN 2020, there are 9,386,454 new cases of cancer in Asia, and it is projected to reach 14,229,878 by 2040. Emerging economies, such as China and India, have adopted both health and industrial policies to encourage the domestic production of cancer drugs, which is leading to lower therapy costs. Lower therapy costs, coupled with increasing awareness about cancer, are leading to higher adoption of chemotherapy and radiotherapy. The increasing burden of cancer leads to greater adoption of radiotherapy and chemotherapy, along with the dry mouth conditions associated with the treatments. Thus, this creates the need for therapeutics for treating xerostomia, which ultimately boosts the market growth in the region.

Also, as per the article titled "An Update on the Lived Experience of Dry Mouth in Sjogren's Syndrome Patients" published in November 2021, dry mouth is a significant condition that impacts the daily lives of people with Sjogren's Syndrome (SS). As per the same source, in the Sjogren's International Collaborative Clinical Alliance (SICCA) registry of 1578 SS participants, 90% reported symptoms of dry mouth. Furthermore, the article titled "Analysis of medication-induced xerostomia in elderly Japanese patients", published in September 2021, stated that the risk of xerostomia also increases with age as the number of medications the elderly population consumes tends to increase. Hence, the increasing prevalence of chronic diseases results in the increased use of medications, thereby resulting in dry mouth.

Thus, the aforesaid factors are likely to boost the growth of the market in the Asia-Pacific region.

Xerostomia (Dry Mouth Disease) Therapeutics Market Competitor Analysis

The xerostomia therapeutics market is moderately competitive. Key players in the xerostomia (dry mouth disease) therapeutics market are focusing on the development of their product portfolio, acquisition of emerging players, and distribution agreements to increase their geographical presence. Some of the key players dominating the xerostomia therapeutics market are 3M, GlaxoSmithKline PLC, Hikma Pharmaceuticals PLC, Lupin, Parnell Pharmaceuticals Inc., Sun Pharmaceutical Industries Ltd., and Synedgen, among others.

Additional Benefits:

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

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