

Huntington'S Disease Treatment Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Huntington's disease treatment market is projected to register a CAGR of 21% during the forecast period.

The outbreak of COVID-19 has adversely affected the global economy as well as the healthcare system. The sudden imposition of lockdown policies and social distancing mandates by the government bodies not only disrupted the supply chains but also impeded the ongoing research programs related to Huntington's disease. This has resulted in the slowdown of product R&D process and approval, thereby affecting market revenue growth. Nonetheless, operating key stakeholders including regulatory bodies, market players, research academics, and others are undertaking various market strategies to mitigate the negative impact of the COVID-19 pandemic on the market. For instance, several onsite trial visits are converted into telephone calls. Also, several research institutes began investigating COVID-19 impact on Huntington's disease patients as well as to improve their care and management. For instance, a research article was published in the Journal Of Huntington's Disease in April 2021 that discussed the healthcare delivery and safer-at-home orders during the COVID-19 pandemic for Huntington's disease patients.

With the high penetration of symptomatic treatments, key players are engaged in capitalizing untapped avenues by the development of novel therapies that target pathways specific to Huntington's disease biology to slow down disease progression. For instance, in April 2021, Voyager Therapeutics, Inc. received the United States Food and Drug Administration (FDA) clearance for IND application for its VY-HTT, a gene therapy candidate designed for the treatment of Huntington's disease. The therapy is designed to reduce the expression of huntingtin gene to further alter the disease progression. Similarly, in December 2021, uniQure N.V. presented clinical outcomes for the first four patients enrolled in the lower-dose cohort of its ongoing Phase I/II clinical trial of AMT-130. AMT-130 is a gene therapy program designed for the treatment of Huntington's disease.

Furthermore, an increase in the number of cases coupled with expanding geriatric population is driving the market revenue. As

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reported in Neuroepidemiology 2021 journal, the prevalence of this disease is around 10 cases per 100,000 people, with a higher prevalence in North America, North-western Europe, the Middle East, and Australia. In these regions, the estimates range from 5.96 to 13.70 cases per 100,000 people. Whereas in Asia, the prevalence is estimated to be 0.41-0.70 cases per 100,000 people.

Huntingtons Disease Treatment Market Trends

The Symptomatic Treatment Segment is Expected to Hold a Major Market Share in the Huntington's Disease Treatment Market

The symptomatic treatment segment is expected to account for the major share during the forecast period. Relatively high availability and usage rate of symptom management therapeutics have bolstered the segment revenue. Need for multiple treatments and the intervention of a multispecialty care team for symptomatic management results in additional expense, thereby high revenue generation through this segment.

Symptomatic therapeutic development majorly focuses on motor impairment and chorea. Chorea remains the most prominent clinical feature of Huntington's disease for which most of the therapeutic studies have been carried out. For instance, in December 2021, Neurocrine Biosciences announced valbenazine has significantly lessened chorea in people with Huntington's disease in Phase 3 clinical trial titled-KINECT-HD. Furthermore, a research paper was published in May 2021 in the journal Brain that demonstrates that the use of gene editing therapy in the early stages of Disease exhibits the potential to slow down symptom progression. These ongoing studies are anticipated to play a crucial role in defining the market share of this segment in the coming years.

North America is Expected to Hold a Significant Share in the Market and Expected to Maintain its Dominance in the Forecast Period.

The anticipated large share of North America can be attributed to the rising burden of the disease. According to data published by Cleveland Clinic in January 2020, this disease affects about 30,000 Americans. The prevalence of disease in North America was 5.7 per 100,000 people. Furthermore, market players are playing a crucial role in accelerating market growth through the expansion of their product portfolio and pipeline programs. For instance, in June 2021, a United States-based company Galyan Bio announced its plans to commence a clinical trial in collaboration with Bicol GmbH for its small molecules candidate that aimed at slowing the progression of Huntington's disease. Furthermore, in January 2022, Ionis Pharmaceuticals, Inc. and Roche announced to design a new Phase 2 trial for evaluation of tominersen in Huntington's disease (HD). These developments are anticipated to positively impact the market growth in North America.

In addition, the active participation of regulatory bodies in safe and effective approval of products for human use is contributing to the market revenue. In September 2021, the FDA granted fast track designation to Sage Therapeutics Inc.'s SAGE-718, a potential treatment for HD. Furthermore, market players are expanding the application of their approved therapies for the inclusion of HD as an indication. For example, San Diego-based Neurocrine announced to expand the application of Ingrezzia (valbenazine), a drug which is first approved in 2017 by the FDA for treatment of tardive dyskinesia (TD), for treatment of Chorea in Huntington's disease. The company anticipated filing of supplemental New Drug Application for this indication in the second half of 2022. These developments are playing a major role in driving revenue for North America market.

Huntingtons Disease Treatment Market Competitor Analysis

The Huntington's disease treatment market is currently fragmented in nature with presence of several large to small and medium sized players. Some of the companies which are currently dominating the market are Pfizer, Inc., Alnylam Pharmaceuticals Inc., Ceregene Inc., Prana Biotechnology Limited, Teva Pharmaceutical Industries Ltd., Ionis Pharmaceuticals, Neurocrine Biosciences, Inc., Prilenia Therapeutics, Azevan Pharmaceuticals, and Lundbeck.

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The market estimate (ME) sheet in Excel format
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