

Hospital Infection Therapeutics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The hospital infection therapeutics market is expected to register a CAGR of 7.2% over the forecast period.

The COVID-19 pandemic had an impact on the hospital infection therapeutics market initially. With the outbreak of COVID-19, the hospital infection therapeutics market experienced a moderate hike in growth. It was primarily due to the massive influx of COVID-19 patients, which also led to the spread of the infection within the hospitals and other healthcare facilities. For instance, a multicentre study published in the Journal of Critical Care in January 2021 mentioned that COVID-19 patients were found to have a high risk of contracting ventilator-associated pneumonia from the invasive ventilation at the intensive care unit of the hospital. However, from late 2021, the number of COVID-19 cases decreased, which led to a gradual decrease in the burden of HAIs (healthcare-associated infections), and so did the demand for hospital infective therapeutics. However, cases of HAIs are still present due to the increasing number of surgeries and other factors that would keep the demand for the hospital infective therapeutics in the post-pandemic. Thus, the COVID-19 outbreak significantly impacted the market's growth in its preliminary phase. Moreover, the market is expected to grow further at a stable pace with the increasing cases of HAIs.

Further, the market is expected to grow with the high prevalence of HAIs and the high volume of surgeries that are associated with infections. The numbers of HAIs are high, which is expected to create more demand for hospital infection therapeutics. For instance, as per the data published by the United States Department of Health & Human Services in November 2022, over 373,602 cases of surgical site infections were reported by acute care hospitals in the United States in 2021. The same source stated that over 3,709 cases of methicillin-resistant Staphylococcus aureus (MRSA) were reported by acute care hospitals in the United States in 2021.

Furthermore, a high volume of surgeries would increase the risk of HAIs and surgical site infections, which would create more

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demand for hospital infection therapeutics. For instance, a study published in the Journal of Plastic, Reconstructive & Aesthetic Surgery in June 2021 highlighted the risk of HAIs associated with breast removal surgeries as the patient stays in the hospital. The study stated that the long stay at the hospital after the mastectomy and increased length of surgical drain retention are likely to cause infections in older female patients. The increasing number of such procedures is propelling the growth of the market. For instance, according to the OECD (Organization for Economic Co-operation and Development), in 2023, over 50,597 and 3,619 procedures of complete mastectomies were performed in Turkey and Portugal, respectively, in 2021.

Additionally, a study published in the Journal PLoS in June 2021 highlighted that in the studied population, the prevalence of post-cesarean section (CS) surgical site infection in hospitals (SSI) was 12.3%. Such an increased risk of infection after a cesarean procedure contributes to the growth of the market. Also, the Organization for Economic Cooperation and Development (OECD) in 2023 stated that over 82,532 and 21,268 cesarean sections were performed in Chile and Ireland, respectively, in 2021. Thus, the high volume of surgical procedures and the high risk of postoperative infections are expected to create more demand for hospital infection therapeutics to curb surgical site infections.

Also, the key developments by the market players in the hospital infection therapeutics market are expected to boost the growth of the market. For instance, in March 2022, Cumberland Pharmaceuticals Inc. and Tabuk Pharmaceutical Manufacturing Company, a fully owned subsidiary of Astra Industrial Group, signed a partnership to launch Cumberland's Vibativ (telavancin) injection in the Middle East. The drug is intended to curb hospital-acquired and ventilator-associated pneumonia caused by the wide array of gram-positive bacterial pathogens and multi-drug-resistant microbes. Also, in November 2022, Eugia, the subsidiary of Aurobindo Pharma, received FDA approval for Amphotericin B Liposome for Injection. The generic drug is used for the treatment of fungal infections.

Therefore, owing to the aforementioned factors, including the increasing prevalence of HAIs and increasing volume of surgeries, the studied market is anticipated to witness growth over the analysis period. However, the increasing antimicrobial resistance is likely to impede the market growth.

Hospital Infection Therapeutics Market Trends

The Antibacterial Drugs Segment is Expected to Witness Significant Growth Over the Forecast Period

Antibacterial drugs are chemical agents which suppress growth and multiplication and kill bacteria. Antibacterial drugs have an essential application in controlling and curing bacterial infections acquired at hospitals. The high volume of hospital-acquired bacterial infections is expected to create a high demand for antibacterial drugs to curb the infections. For instance, as per the data published by the United States Department of Health & Human Services in November 2022, over 3,774 cases of catheter-associated urinary tract infections were reported by acute care hospitals in the United States in 2021.

Furthermore, several studies have highlighted the high burden of HAIs and the use of antibacterials for their effective management. Further, a study published in the International Journal of Environmental Research and Public Health in December 2021 highlighted the increased use of antibiotic and antibacterial drugs, such as Ceftriaxone, Piperacillin, Metronidazole, and others, in the public hospitals of Makkah, Saudi Arabia. Antibiotics and antibacterial drugs were administered to the patients to control HAIs such as pneumonia, cardiovascular system and prophylactic gastrointestinal tract infections, and others. Thus, the high prevalence of hospital-acquired bacterial infections and the massive use of antibacterial for their management are expected to boost the demand for antibacterial drugs globally.

Furthermore, the recent launches by the market players in the area of antibacterial drugs would further strengthen the growth of the segment. For instance, in March 2023, Glenmark Pharmaceuticals received approval from the USFDA to market a generic antibiotic drug, Clindamycin Hydrochloride capsules. The drug is the generic version of Pfizer's Cleocin capsules and is intended

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for the management of a variety of infections. Further, in September 2021, BDR Pharma launched its drug BIAPENEM, which is a carbapenem antibacterial agent intended to treat urinary tract infections.

Therefore, the antibacterial drugs segment is expected to witness significant growth over the forecast period due to the abovementioned factors, including its vast applications to curb bacterial infections acquired at hospitals.

North America is Expected to Witness Significant Growth Over the Forecast Period

North America is expected to witness significant growth over the forecast period, owing to factors such as the high prevalence of HAIs, high volume of hospitalizations and surgery, expanding geriatric population, advanced medical expenditure, and infrastructure. The region has a high prevalence of HAIs, which is expected to drive the demand for hospital infection therapeutics. For instance, as per the data published by the United States Department of Health & Human Services in November 2022, 30,389 cases of catheter line-associated bloodstream infections were recorded in acute care hospitals in the United States in 2021. The same source stated that over 1,995 cases of ventilator-associated infections were reported by acute care hospitals in the United States in 2021.

Furthermore, the region has a high volume of surgeries, which also increases the risk of contracting HAIs, and this increases the demand for hospital infection therapeutics in the region. For instance, data published by the Canadian Institute for Health Information (CIHI) in June 2022 states that over 110,000 procedures of joint replacements were performed in 2020-2021, and more than 7,300 procedures were performed as day surgeries.

Also, the key developments by the market players in the region are expected to boost the growth of the market. For instance, in December 2022, Innoviva, Inc. received acceptance from the USFDA for the Priority Review of the new drug application for its SUL-DUR. The NDA submission is based on results from the landmark phase 3 ATTACK trial evaluating the safety and efficacy of SUL-DUR in patients with ABS infection in hospital-acquired pneumonia, ventilated pneumonia or bacteremia, ventilator-associated bacterial pneumonia, and other patients. Further, in March 2022, Cumberland Pharmaceuticals Inc. and Verity Pharmaceuticals International Ltd. today launched Cumberland's VIBATIV (telavancin) injection in Puerto Rico, the United States. The drug injection is intended for the management of hospital-acquired and ventilator-associated pneumonia.

Therefore, owing to the aforementioned factors, including the high prevalence of HAIs and the high volume of surgeries, the growth of the studied market is anticipated in the North American region.

Hospital Infection Therapeutics Industry Overview

The hospital infection therapeutics market is moderately fragmented in nature due to the presence of a few companies operating globally as well as regionally. The competitive landscape includes an analysis of some international as well as local companies that hold market shares and are well known, including AbbVie Inc., Merck & Co., Inc., Teva Pharmaceutical Industries Ltd., Viatris Inc., F. Hoffmann-La Roche AG, Bayer AG, GlaxoSmithKline plc, Aurobindo Pharma (Eugia), Sanofi, Pfizer, Inc., among others.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

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1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

4.1 Market Overview

4.2 Market Drivers

4.2.1 High prevalence of Hospital Acquired Infections

4.2.2 Increasing volume of surgical procedures

4.3 Market Restraints

4.3.1 Increasing antimicrobial resistance

4.4 Porter's Five Forces Analysis

4.4.1 Threat of New Entrants

4.4.2 Bargaining Power of Buyers/Consumers

4.4.3 Bargaining Power of Suppliers

4.4.4 Threat of Substitute Products

4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value - USD million)

5.1 By Drug Type

5.1.1 Antibacterial Drugs

5.1.2 Anti-fungal Drugs

5.1.3 Antiviral Drugs

5.1.4 Others

5.2 By Indication

5.2.1 Blood Stream Infections

5.2.2 Urinary Tract Infections

5.2.3 Surgical Site Infections

5.2.4 Pneumonia

5.2.5 Others

5.3 Geography

5.3.1 North America

5.3.1.1 United States

5.3.1.2 Canada

5.3.1.3 Mexico

5.3.2 Europe

5.3.2.1 Germany

5.3.2.2 United Kingdom

5.3.2.3 France

5.3.2.4 Italy

5.3.2.5 Spain

5.3.2.6 Rest of Europe

5.3.3 Asia-Pacific

5.3.3.1 China

5.3.3.2 Japan

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- 5.3.3.3 India
- 5.3.3.4 Australia
- 5.3.3.5 South Korea
- 5.3.3.6 Rest of Asia-Pacific
- 5.3.4 Middle East and Africa
 - 5.3.4.1 GCC
 - 5.3.4.2 South Africa
 - 5.3.4.3 Rest of Middle East and Africa
- 5.3.5 South America
 - 5.3.5.1 Brazil
 - 5.3.5.2 Argentina
 - 5.3.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles
 - 6.1.1 AbbVie Inc.
 - 6.1.2 Merck & Co., Inc.
 - 6.1.3 Teva Pharmaceutical Industries Ltd.
 - 6.1.4 Viatris Inc.
 - 6.1.5 F. Hoffmann-La Roche AG
 - 6.1.6 Bayer AG
 - 6.1.7 GlaxoSmithKline plc
 - 6.1.8 Aurobindo Pharma (Eugia)
 - 6.1.9 Sanofi S.A.
 - 6.1.10 Pfizer, Inc.
 - 6.1.11 Melinta Therapeutics
 - 6.1.12 Hikma Pharmaceuticals PLC
 - 6.1.13 Glenmark Pharmaceuticals Limited

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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