

Idiopathic Pulmonary Fibrosis - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 110 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Idiopathic Pulmonary Fibrosis Market size is estimated at USD 4.60 billion in 2024, and is expected to reach USD 6.43 billion by 2029, growing at a CAGR of 6.95% during the forecast period (2024-2029).

The COVID-19 pandemic has significantly impacted the idiopathic pulmonary fibrosis (IPF) market. While IPF is a chronic lung disease that COVID-19 does not directly cause, it affects various aspects of IPF, such as diagnosis, treatment, and patient care. According to an article published by MDPI in March 2023, SARS-CoV-2 infection caused acute exacerbation of idiopathic pulmonary fibrosis, negatively impacting patients' prognosis. However, there was a high risk of patients developing idiopathic pulmonary fibrosis months after being infected by the COVID-19 infection, leading to increased demand for its treatment modalities. For instance, according to an article published by Elsevier Public Health Emergency Collection in July 2021, elderly patients who required ICU care and mechanical ventilation were at the highest risk of developing lung fibrosis. Hence, the pandemic has brought greater attention to respiratory health. As a result, there has been an increased awareness and understanding of IPF among the general population and healthcare professionals. This has increased the demand for idiopathic pulmonary fibrosis treatment, which is expected to drive market growth during the forecast period.

The increasing prevalence of idiopathic pulmonary fibrosis, the growing geriatric population, and rising research and development activities in fibrotic diseases are some key factors expected to drive the market's growth during the forecast period. According to an article published by Prescriber, in July 2022, the annual incidence of idiopathic pulmonary fibrosis in Europe was estimated at 0.22 to 7.4 per 100,000 people, and approximately 32,500 people in the United Kingdom had idiopathic pulmonary fibrosis, with a prevalence of about 50 per 100,000 people. Further, as per the same source, it affects an elderly population and affects men more frequently than women. According to WHO update in October 2022, one in every six individuals globally will be above 60 years by 2030. By that time, the population aged 60 and more will have increased by 1.4 billion. The ageing process is associated

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

with cellular and molecular lung changes, which contribute to the development and progression of idiopathic pulmonary fibrosis. Thus, with the rising geriatric population, the risk of idiopathic pulmonary fibrosis increase, increasing demand for its treatment, thereby driving the market's growth.

The market players are actively involved in product launches, developments, and collaborations to expand their footprint, leading to market growth. For instance, in May 2022, Alembic Pharmaceutical Limited received final approval from the US FDA for pirfenidone tablets in 267 mg and 800 mg doses. Pirfenidone is prescribed for the treatment of idiopathic pulmonary fibrosis.

Therefore, due to the high prevalence of idiopathic pulmonary fibrosis, the growing geriatric population, and the approval of novel drugs, the market studied is expected to during over the forecast period. However, the lack of proper treatment and awareness in developing countries is expected to impede market growth during the forecast period.

Idiopathic Pulmonary Fibrosis Market Trends

Pirfenidone is Expected to Hold a Significant Share in the Global Idiopathic Pulmonary Fibrosis Market Over the Forecast Period

Pirfenidone is an orally administered drug with antifibrotic, anti-inflammatory, and antioxidant effects. This drug is used to slow the disease progression in patients with idiopathic pulmonary fibrosis (IPF). Unlike other therapies, pirfenidone is an oral medication that provides patients convenience and ease of administration. It has a favorable safety profile and is generally well-tolerated, making it a suitable option for long-term treatment. The rising research and development activities and growing adoption of strategic initiatives such as mergers, acquisitions, partnerships, and investments by key market players associated with the drug pirfenidone allow companies to strengthen their product portfolios and enhance distribution networks, thereby contributing to the studied market growth over the study period. For instance, according to an article published by the Journal of Thoracic Disease, in March 2023, a trial has been registered at the UMIN Clinical Trials Registry for perioperative pirfenidone therapy in patients with non-small cell lung cancer combined with idiopathic pulmonary fibrosis to confirm the preventative effect against postoperative acute exacerbation.

Furthermore, per the study article published in the NIH in 2021, pirfenidone provides survival benefits for patients with idiopathic pulmonary fibrosis (IPF). Hence, the rising research and development activities are expected to drive segmental growth. Additionally, the companies are involved in strategic developments such as product launches, acquisitions and collaboration to expand their footprint, which is expected to drive segmental growth. For instance, in June 2022, Accord Healthcare, Inc reported the addition of Pirfenidone to its solid oral products portfolio in the United States. This new drug is therapeutically equivalent to Genentech's Esbriet and is approved to treat idiopathic pulmonary fibrosis (IPF).

Hence, owing to the advantages of pirfenidone over other drug types, ongoing research and development activities, and new product launches, it is expected to hold a significant market share during the forecast period.

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

The market for idiopathic pulmonary fibrosis in North America is expected to hold a significant market share owing to the rising burden of patients diagnosed with idiopathic pulmonary fibrosis and the robust healthcare infrastructure to treat idiopathic pulmonary fibrosis. For instance, in January 2022, in the United States, the median age of newly diagnosed patients is 62 years, and 54% are male. According to an article published by Springer Healthcare Communications in January 2023, the adjusted prevalence rates of idiopathic pulmonary fibrosis in North America were 2.40 to 2.98 per 10,000 people. Hence, the high burden of the disease is expected to drive market growth.

Additionally, the strategic initiatives key market players take to strengthen their product portfolios and enhance distribution

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

networks contribute to regional market growth. For instance, in May 2022, PureTech Health plc reported the presentation of additional data for PureTech's LYT-100 (deupirfenidone) at the American Thoracic Society 2022 International Conference. The data support the upcoming registration-enabling studies in which PureTech plans to investigate LYT-100 in patients with idiopathic pulmonary fibrosis (IPF) at the scheduled 550 mg three times daily dose (TID) as well as a dose with a higher total drug exposure than the currently approved dose of pirfenidone to evaluate if higher exposure could translate into improved efficacy. Such initiatives undertaken by market players are anticipated to boost market growth.

Furthermore, product launches, partnerships, and mergers and acquisitions will help the companies expand their product offering and geographical footprints, thereby contributing to the lucrative growth of the market. For instance, in February 2022, Boehringer Ingelheim reported that the US FDA granted Breakthrough Therapy Designation to its novel investigational therapy, BI 1015550, for treating idiopathic pulmonary fibrosis (IPF).

Hence, owing to the factors such as the rising burden of idiopathic pulmonary fibrosis and strategic initiative, the market studied is expected to grow over the forecast period in the region.

Idiopathic Pulmonary Fibrosis Industry Overview

The idiopathic pulmonary fibrosis market is moderately competitive in nature, and there are several local and international companies in this market. Some of the key market players in the market are Afferent Pharmaceuticals, Boehringer Ingelheim, Bristol-Myers Squibb, Cipla Inc., F. Hoffmann-La Roche Ltd, FibroGen, Genentech USA Inc., Jubilant Cadista, Merck & Co. Inc., and Prometic Life Sciences.

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
- 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 Increasing Prevalence of Idiopathic Pulmonary Fibrosis and Growing Geriatric Population
 - 4.2.2 Rising Research and Development Activities in Fibrotic Diseases
- 4.3 Market Restraints
 - 4.3.1 Unavailability of Proper Treatment and Lack of Awareness in Developing Countries
- 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

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 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 Nintedanib
- 5.1.2 Pirfenidone
- 5.1.3 Other Drug Types

5.2 By Mode of Action

- 5.2.1 Antifibrotic Agents
- 5.2.2 Tyrosine Kinase Inhibitors
- 5.2.3 Other Modes of Action

5.3 By End User

- 5.3.1 Hospitals and Clinics
- 5.3.2 Pharmacies
- 5.3.3 Other End Users

5.4 By Geography

5.4.1 North America

- 5.4.1.1 United States
- 5.4.1.2 Canada
- 5.4.1.3 Mexico

5.4.2 Europe

- 5.4.2.1 Germany
- 5.4.2.2 United Kingdom
- 5.4.2.3 France
- 5.4.2.4 Italy
- 5.4.2.5 Spain
- 5.4.2.6 Rest of Europe

5.4.3 Asia-Pacific

- 5.4.3.1 China
- 5.4.3.2 Japan
- 5.4.3.3 India
- 5.4.3.4 Australia
- 5.4.3.5 South Korea
- 5.4.3.6 Rest of Asia-Pacific

5.4.4 Middle East and Africa

- 5.4.4.1 GCC
- 5.4.4.2 South Africa
- 5.4.4.3 Rest of Middle East and Africa

5.4.5 South America

- 5.4.5.1 Brazil
- 5.4.5.2 Argentina
- 5.4.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE

6.1 Company Profiles

- 6.1.1 United Therapeutics Corporation

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.1.2 Boehringer Ingelheim International GmbH
- 6.1.3 Bristol-Myers Squibb Company
- 6.1.4 Cipla Inc.
- 6.1.5 F. Hoffmann-La Roche Ltd
- 6.1.6 FibroGen Inc.
- 6.1.7 MediciNova Inc.
- 6.1.8 Jubilant Pharma Limited (Jubilant Cadista Limited)
- 6.1.9 Merck & Co. Inc.
- 6.1.10 Horizon Therapeutics Inc.
- 6.1.11 Avalyn Pharma Inc.
- 6.1.12 CS Pharmaceuticals

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Idiopathic Pulmonary Fibrosis - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 110 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-03-06
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com