

Japan Rare Disease Therapeutics Market By Therapeutic Area (Hematologic Diseases, Cancer, Infectious Diseases, Cardiovascular Diseases, Metabolic Diseases, Endocrine Diseases, Musculoskeletal Diseases, Others), By Route of Administration (Injectable, Oral, Others), By Drug Type (Biologics, Biosimilar, Small Molecules), By Distribution Channel (Specialty Pharmacies, Hospital Pharmacies, Online Pharmacies), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Report description:

Japan Rare Disease Therapeutics Market was valued at USD 3.39 Billion in 2024 and is anticipated to project impressive growth in the forecast period with a CAGR of 11.02% through 2030. The Japan Rare Disease Therapeutics Market is primarily driven by several key factors. Advancements in genetic research and diagnostic technologies have improved the understanding and identification of rare diseases, facilitating earlier and more accurate diagnoses. Regulatory initiatives and orphan drug designations provide incentives for pharmaceutical companies to develop treatments for rare diseases, thereby expanding the therapeutic options available to patients. Growing awareness among healthcare professionals and the public about rare diseases has heightened the demand for effective therapies and improved access to specialized healthcare services. Collaborations between academia, industry, and government entities contribute to research and development efforts, accelerating innovation in rare disease therapeutics. These factors collectively contribute to the growth and evolution of the Japan Rare Disease Therapeutics Market, aiming to address unmet medical needs and enhance the quality of life for patients with rare diseases.

Key Market Drivers

Regulatory Incentives and Orphan Drug Designations

Japan's regulatory framework offers significant incentives that play a crucial role in encouraging pharmaceutical companies to

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invest in the development of rare disease therapeutics. Central to this framework are orphan drug designations and accelerated approval pathways, which are pivotal in expediting the process of bringing treatments to market for conditions affecting a small population. Orphan drug designations are granted to therapies intended for diseases that affect a limited number of patients. In Japan, such designations confer several benefits to pharmaceutical companies. They include extended periods of market exclusivity, during which competitors are restricted from introducing similar therapies to the market. This exclusivity period allows companies to recoup their investments by capitalizing on their innovative treatments without immediate competition, thereby incentivizing risk-taking and fostering innovation in the rare disease space.

Orphan drug status also comes with tax incentives and fee reductions, which significantly alleviate the financial burdens associated with research, development, and regulatory processes. These incentives aim to offset the high costs and risks typically associated with developing treatments for rare diseases, where patient populations are small and clinical trials may be challenging to conduct. Accelerated approval pathways further streamline the regulatory process by expediting the review and approval timelines for promising therapies targeting unmet medical needs. This approach prioritizes therapies that demonstrate substantial benefits over existing treatments or address critical gaps in patient care. By reducing regulatory barriers and timelines, Japanese authorities enable quicker access to innovative treatments for patients with rare diseases, addressing urgent medical needs more efficiently.

Growing Prevalence and Awareness of Rare Diseases

Increasing awareness among healthcare professionals, policymakers, and the general public about rare diseases has amplified the demand for effective therapeutics in Japan. Improved disease awareness has led to earlier diagnoses and enhanced patient management strategies. Rare disease patient advocacy groups and support organizations play a crucial role in raising awareness, advocating for research funding, and promoting policy initiatives that prioritize rare disease healthcare needs. As awareness continues to grow, there is a heightened focus on addressing unmet medical needs and improving access to specialized care and treatments for individuals affected by rare diseases. According to an article titled, "Evaluation of Clinical Practice Guidelines for Rare Diseases in Japan", in 2018, out of the 331 designated rare/intractable diseases, 327 were categorized as "rare diseases" because they affected fewer than 50,000 patients in Japan. The four diseases excluded from this classification were ulcerative colitis, Parkinson's disease, systemic lupus erythematosus, and Sjogren's syndrome. Diseases affecting less than 50,000 patients qualify for orphan designation under pharmaceutical regulations, equating to a prevalence rate of approximately 4 in 10,000 people. By comparison, in the EU, diseases affecting fewer than 5 in 10,000 people are classified as rare.

Collaborative Research and Development Efforts

Collaborations among academia, industry stakeholders, and government entities have emerged as catalysts for accelerating research and development (R&D) efforts within the Japan Rare Disease Therapeutics Market. These partnerships, spanning public-private alliances, research consortia, and academic-industry collaborations, are instrumental in fostering synergies that drive scientific advancements and therapeutic innovations.

One of the primary advantages of these collaborative initiatives is the facilitation of knowledge sharing and resource pooling. Academic institutions contribute invaluable scientific expertise and research infrastructure, while industry stakeholders bring industry-specific insights, technological capabilities, and financial resources to the table. Government entities play a pivotal role in providing regulatory guidance, funding support, and policy frameworks that incentivize collaborative R&D activities.

These partnerships are particularly effective in advancing key areas of rare disease research, such as biomarker discovery, drug repurposing, gene therapy development, and clinical trial design. By leveraging diverse expertise and resources, collaborators can expedite the identification of biomarkers that facilitate early diagnosis and disease monitoring. Drug repurposing initiatives explore the potential of existing therapies for new therapeutic indications, accelerating the timeline for bringing treatments to market.

Advances in Biotechnology and Drug Delivery Systems

Technological advancements in biotechnology, including gene editing techniques, cell-based therapies, and nanotechnology, hold promise for revolutionizing rare disease therapeutics in Japan. These innovative approaches enable the development of targeted therapies that address the underlying genetic or molecular mechanisms of rare diseases. Biopharmaceutical companies are leveraging these advancements to develop next-generation treatments with improved efficacy, safety profiles, and patient outcomes. Advancements in drug delivery systems enhance the bioavailability, stability, and targeted delivery of therapeutic

agents, optimizing treatment efficacy and minimizing adverse effects in patients with rare diseases.

Patient-Centric Approaches and Personalized Medicine

The shift towards personalized medicine and patient-centric approaches is reshaping the Japan Rare Disease Therapeutics Market. Advances in genomic medicine, pharmacogenomics, and precision medicine technologies enable tailored treatment strategies based on individual genetic profiles, disease characteristics, and patient preferences. Biomarker-driven diagnostics facilitate early identification of disease subtypes and predict patient responses to specific therapies, guiding personalized treatment decisions. Patient registries, real-world data initiatives, and patient engagement platforms enhance clinical trial recruitment, outcomes assessment, and post-market surveillance, supporting evidence-based healthcare delivery for individuals with rare diseases.

Key Market Challenges

Limited Patient Population and Fragmented Market

One of the primary challenges facing the Japan Rare Disease Therapeutics Market stems from the inherently small patient populations associated with each rare disease. Rare diseases are defined by their low prevalence, typically affecting a limited number of individuals within the population. In Japan, as in other countries, this rarity poses significant hurdles for pharmaceutical companies aiming to develop and commercialize treatments.

The small patient population directly impacts the feasibility and economics of drug development. Pharmaceutical companies face substantial costs throughout the drug development lifecycle, including research and discovery, preclinical and clinical trials, regulatory approvals, and manufacturing. These costs are spread across a smaller number of potential patients compared to more common diseases, leading to higher per-patient development expenses. Consequently, the return on investment for developing therapies for rare diseases may be less predictable and potentially lower than for treatments targeting larger patient populations. The limited patient pool results in a fragmented market for rare disease therapies. With fewer patients eligible for treatment, pharmaceutical products may struggle to achieve economies of scale necessary to lower production costs and achieve sustainable profitability. This fragmentation can lead to higher prices for rare disease treatments, as manufacturers seek to recover their development and manufacturing expenses from a smaller market base.

High Costs and Financial Burdens

Developing treatments for rare diseases involves substantial financial investments due to the complexities and uncertainties associated with research and development. The costs of conducting clinical trials, obtaining regulatory approvals, and manufacturing specialized therapies are often disproportionate to the potential market size. The pricing of orphan drugs needs to balance the recovery of development costs with affordability for healthcare systems and patients, posing a significant financial challenge.

Diagnostic Delays and Misdiagnosis

Diagnosing rare diseases presents a multifaceted challenge due to several factors that complicate the process. These diseases are characterized by their low prevalence and often exhibit a wide spectrum of symptoms that can overlap with more common conditions, making accurate diagnosis particularly challenging. There is often limited awareness and familiarity among healthcare providers about these rare conditions, further delaying diagnosis and appropriate treatment.

The diverse and overlapping symptoms of rare diseases contribute significantly to diagnostic difficulties. Many rare diseases manifest in ways that mimic more common ailments or may present with symptoms that vary widely among affected individuals. This variability can lead to misdiagnosis or delayed diagnosis, as healthcare professionals may not immediately consider rare diseases in their differential diagnosis. This delay not only prolongs patient suffering but also impacts the effectiveness of treatment outcomes, as early intervention is crucial for managing rare diseases and mitigating their progression. The rarity of these diseases means that healthcare providers may encounter them infrequently in clinical practice, further reducing their familiarity and confidence in recognizing and diagnosing these conditions. This lack of awareness can result in underestimation of the prevalence of rare diseases within patient populations, leading to missed opportunities for timely intervention and appropriate management strategies.

Key Market Trends

Globalization of Clinical Trials and Market Access

The increasing globalization of clinical trials and market access strategies represents a pivotal shift in the landscape of rare disease therapeutics, offering Japanese biopharmaceutical companies unprecedented opportunities for collaboration and

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expansion into global markets. This trend is driven by several key factors that collectively enhance the competitiveness and reach of Japanese companies in the field of rare disease treatments. One of the primary benefits of globalization in this context is the facilitation of cross-border collaborations. By partnering with international stakeholders, including pharmaceutical companies, research institutions, and healthcare organizations, Japanese biopharmaceutical firms can pool resources, expertise, and patient populations from diverse geographic regions. This collaborative approach not only accelerates the pace of clinical trials but also enhances the robustness and generalizability of research findings. Multi-national clinical trials conducted across different countries enable companies to gather comprehensive data on treatment efficacy, safety profiles, and patient responses, which are essential for regulatory submissions and market approvals.

Globalization supports streamlined regulatory processes and harmonization of standards, particularly in the context of orphan drug approvals. Regulatory authorities worldwide, including those in Japan, have implemented expedited pathways and incentives to facilitate the development and approval of therapies for rare diseases. Harmonization initiatives aim to align regulatory requirements across countries, reducing duplication of efforts and accelerating market access for innovative treatments. Japanese biopharmaceutical companies can leverage these harmonized standards to navigate complex regulatory landscapes more efficiently, ensuring timely access to novel therapies for patients with rare diseases.

Advancements in Genetic Research and Diagnostics

Japan's Rare Disease Therapeutics Market is profoundly influenced by continuous advancements in genetic research and diagnostic technologies, which have brought about a paradigm shift in the understanding and management of rare diseases. These technological innovations have significantly expedited and enhanced the diagnostic process for rare diseases, enabling healthcare providers to achieve quicker and more accurate diagnoses than ever before. Key technologies driving this progress include molecular genetic testing, whole genome sequencing (WGS), and other state-of-the-art techniques that delve into the genetic makeup of individuals. These tools play a pivotal role in identifying specific genetic mutations and variants associated with various rare diseases. In April 2024, NS Pharma, Inc. announced that its parent company, Nippon Shinyaku Co., headquartered in Kyoto, Japan, has entered into a collaborative research agreement with MiNA Therapeutics, based in London, United Kingdom (UK), aimed at developing nucleic acid drugs for treating challenging and rare central nervous system diseases. The partnership, facilitated by NS Pharma's Innovation Research Partnering (IRP) team in the US, marks a significant step towards advancing RNAa therapeutics, which involve oligonucleotides capable of enhancing the transcription of specific target genes. Under this agreement, MiNA Therapeutics will supply Nippon Shinyaku with RNAa therapeutics. Nippon Shinyaku retains the option to exclusively research and develop pharmaceutical candidates resulting from this collaboration, contingent upon making lump sum payments and meeting milestones tied to the progress of research and development. Upon exercising this option, the company will further contribute through milestone payments and royalties linked to the developmental stages and sales of the product(s) post-launch. The advancements in genetic research have paved the way for the development of targeted therapies and personalized medicine approaches. Armed with a deeper understanding of the genetic underpinnings of rare diseases, researchers and pharmaceutical companies can design therapies that specifically target the molecular pathways driving disease progression.

Segmental Insights

Therapeutic Area Insights

Based on the Therapeutic Area, cancer stands out as one of the dominant areas of focus among rare diseases. Cancer encompasses a diverse group of diseases characterized by uncontrolled cell growth and proliferation, often arising from genetic mutations or environmental factors. While many cancers are well-known and relatively common, there are numerous rare or less common forms that pose significant challenges due to their rarity and unique biological characteristics. Rare cancers in Japan include conditions such as certain types of sarcomas, rare subtypes of leukemia, and various pediatric cancers, among others. These diseases affect a smaller number of individuals compared to more prevalent cancers like lung or breast cancer. Despite their rarity, rare cancers collectively represent a substantial burden due to their impact on patients' lives and the challenges they pose for diagnosis, treatment, and management.

The dominance of cancer in the Japan Rare Disease Therapeutics Market can be attributed to several factors. Advances in molecular genetics and genomic profiling have enabled researchers and clinicians to better understand the underlying genetic mutations and pathways driving rare cancers. This deeper understanding has facilitated the development of targeted therapies that specifically address the molecular abnormalities present in these diseases. Targeted therapies, such as tyrosine kinase

inhibitors and monoclonal antibodies, have revolutionized cancer treatment by offering more precise and effective options with potentially fewer side effects compared to traditional chemotherapy.

Route of Administration Insights

Based on Route of Administration, injectable therapies are often dominant compared to oral treatments, primarily due to several key factors influencing their effectiveness and adoption. Injectable therapies offer distinct advantages in the management of rare diseases, particularly in delivering precise dosages, ensuring bioavailability, and achieving therapeutic efficacy. One of the primary reasons injectable therapies dominate is their ability to deliver medications directly into the bloodstream or targeted tissues, bypassing the digestive system. This route of administration ensures rapid onset of action and predictable pharmacokinetics, crucial for treating conditions with complex biological mechanisms or rapid disease progression. For rare diseases that require immediate and consistent therapeutic levels, such as certain hematologic disorders or enzyme deficiencies, injectable therapies provide a reliable method of drug delivery.

Many rare diseases involve conditions where specific proteins, enzymes, or biological agents need replacement or modification. Injectable therapies, such as recombinant proteins, monoclonal antibodies, or gene therapies, are designed to precisely target and modulate these biological processes. These advanced biologic therapies often necessitate parenteral administration to ensure their stability and efficacy, as they may be degraded or rendered ineffective if administered orally due to digestive enzymes or acidic conditions in the gastrointestinal tract. Injectable therapies are preferred in the treatment of rare diseases that require frequent dosing or precise adjustments based on patient response. Subcutaneous or intravenous injections allow for flexible dosing schedules and the ability to tailor treatment regimens to individual patient needs, optimizing therapeutic outcomes while minimizing adverse effects. This flexibility is particularly beneficial in managing chronic rare diseases, where maintaining consistent drug levels is critical to disease control and patient well-being.

Regional Insights

Kanto, encompassing Tokyo and its surrounding prefectures, emerges as a dominant region in the Japan Rare Disease Therapeutics Market for several compelling reasons. Kanto serves as a pivotal hub for research and development in the biomedical and pharmaceutical sectors. The region hosts renowned universities, research institutions, and biotechnology companies at the forefront of innovative medical technologies. These entities drive forward research initiatives focused on rare diseases, leveraging advanced scientific capabilities and fostering collaborations that accelerate the discovery and development of novel therapeutics.

Kanto's healthcare infrastructure is exceptionally robust, featuring state-of-the-art hospitals, specialized clinics, and a highly skilled workforce of healthcare professionals. This infrastructure not only supports the diagnosis and treatment of rare diseases but also facilitates comprehensive patient care and management. Patients with rare diseases often seek specialized treatment options available in Kanto, drawn by the region's reputation for delivering cutting-edge medical interventions and therapies. The proximity of Kanto to key regulatory bodies, such as the Pharmaceuticals and Medical Devices Agency (PMDA), enhances its strategic advantage in navigating regulatory pathways for drug approvals and market access. This proximity streamlines the regulatory process, enabling quicker approvals and smoother commercialization of rare disease therapies. Pharmaceutical companies and biotech firms in Kanto benefit from expedited pathways and regulatory support, facilitating timely introduction of innovative treatments to meet the needs of patients with rare diseases.

Key Market Players

- GlaxoSmithKline K.K.
- Sanofi K.K
- Pfizer Japan Inc.
- Sun Pharma Japan Ltd.
- Novartis Pharma K.K.
- AstraZeneca K.K.
- Meiji Seika Pharma Co., Ltd.
- Merck Biopharma Co., Ltd.
- MSD K.K.
- Otsuka Pharmaceutical Co., Ltd.

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Report Scope:

In this report, the Japan Rare Disease Therapeutics Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

☐☐Japan Rare Disease Therapeutics Market, By Therapeutic Area:

- o Hematologic Diseases
- o Cancer
- o Infectious Diseases
- o Cardiovascular Diseases
- o Metabolic Diseases
- o Endocrine Diseases
- o Musculoskeletal Diseases
- o Others

☐☐Japan Rare Disease Therapeutics Market, By Route of Administration:

- o Injectable
- o Oral
- o Others

☐☐Japan Rare Disease Therapeutics Market, By Drug Type:

- o Biologics
- o Biosimilar
- o Small Molecules

☐☐Japan Rare Disease Therapeutics Market, By Distribution Channel:

- o Specialty Pharmacies
- o Hospital Pharmacies
- o Online Pharmacies

☐☐Japan Rare Disease Therapeutics Market, By Region:

- o Hokkaido
- o Tohoku
- o Kanto
- o Chubu
- o Kansai
- o Chugoku
- o Shikoku
- o Kyushu

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Japan Rare Disease Therapeutics Market.

Available Customizations:

Japan Rare Disease Therapeutics Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

☐☐Detailed analysis and profiling of additional market players (up to five).

Table of Contents:

1. Product Overview
- 1.1. Market Definition
- 1.2. Scope of the Market
- 1.2.1. Markets Covered
- 1.2.2. Years Considered for Study

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- 1.2.3. Key Market Segmentations
2. Research Methodology
 - 2.1. Objective of the Study
 - 2.2. Baseline Methodology
 - 2.3. Key Industry Partners
 - 2.4. Major Association and Secondary Sources
 - 2.5. Forecasting Methodology
 - 2.6. Data Triangulation & Validations
 - 2.7. Assumptions and Limitations
3. Executive Summary
 - 3.1. Overview of the Market
 - 3.2. Overview of Key Market Segmentations
 - 3.3. Overview of Key Market Players
 - 3.4. Overview of Key Regions/Countries
 - 3.5. Overview of Market Drivers, Challenges, Trends
4. Voice of Customer
5. Japan Rare Disease Therapeutics Market Outlook
 - 5.1. Market Size & Forecast
 - 5.1.1. By Value
 - 5.2. Market Share & Forecast
 - 5.2.1. By Therapeutic Area (Hematologic Diseases, Cancer, Infectious Diseases, Cardiovascular Diseases, Metabolic Diseases, Endocrine Diseases, Musculoskeletal Diseases, Others)
 - 5.2.2. By Route of Administration (Injectable, Oral, Others)
 - 5.2.3. By Drug Type (Biologics, Biosimilar, Small Molecules)
 - 5.2.4. By Distribution Channel (Specialty Pharmacies, Hospital Pharmacies, Online Pharmacies)
 - 5.2.5. By Region
 - 5.2.6. By Company (2024)
 - 5.3. Market Map
6. Hokkaido Rare Disease Therapeutics Market Outlook
 - 6.1. Market Size & Forecast
 - 6.1.1. By Value
 - 6.2. Market Share & Forecast
 - 6.2.1. By Therapeutic Area
 - 6.2.2. By Route of Administration
 - 6.2.3. By Drug Type
 - 6.2.4. By Distribution Channel
7. Tohoku Rare Disease Therapeutics Market Outlook
 - 7.1. Market Size & Forecast
 - 7.1.1. By Value
 - 7.2. Market Share & Forecast
 - 7.2.1. By Therapeutic Area
 - 7.2.2. By Route of Administration
 - 7.2.3. By Drug Type
 - 7.2.4. By Distribution Channel
8. Kanto Rare Disease Therapeutics Market Outlook
 - 8.1. Market Size & Forecast
 - 8.1.1. By Value

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- 8.2. Market Share & Forecast
 - 8.2.1. By Therapeutic Area
 - 8.2.2. By Route of Administration
 - 8.2.3. By Drug Type
 - 8.2.4. By Distribution Channel
- 9. Chubu Rare Disease Therapeutics Market Outlook
 - 9.1. Market Size & Forecast
 - 9.1.1. By Value
 - 9.2. Market Share & Forecast
 - 9.2.1. By Therapeutic Area
 - 9.2.2. By Route of Administration
 - 9.2.3. By Drug Type
 - 9.2.4. By Distribution Channel
- 10. Kansai Rare Disease Therapeutics Market Outlook
 - 10.1. Market Size & Forecast
 - 10.1.1. By Value
 - 10.2. Market Share & Forecast
 - 10.2.1. By Therapeutic Area
 - 10.2.2. By Route of Administration
 - 10.2.3. By Drug Type
 - 10.2.4. By Distribution Channel
- 11. Chugoku Rare Disease Therapeutics Market Outlook
 - 11.1. Market Size & Forecast
 - 11.1.1. By Value
 - 11.2. Market Share & Forecast
 - 11.2.1. By Therapeutic Area
 - 11.2.2. By Route of Administration
 - 11.2.3. By Drug Type
 - 11.2.4. By Distribution Channel
- 12. Shikoku Rare Disease Therapeutics Market Outlook
 - 12.1. Market Size & Forecast
 - 12.1.1. By Value
 - 12.2. Market Share & Forecast
 - 12.2.1. By Therapeutic Area
 - 12.2.2. By Route of Administration
 - 12.2.3. By Drug Type
 - 12.2.4. By Distribution Channel
- 13. Kyushu Rare Disease Therapeutics Market Outlook
 - 13.1. Market Size & Forecast
 - 13.1.1. By Value
 - 13.2. Market Share & Forecast
 - 13.2.1. By Therapeutic Area
 - 13.2.2. By Route of Administration
 - 13.2.3. By Drug Type
 - 13.2.4. By Distribution Channel
- 14. Market Dynamics
 - 14.1. Drivers

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- 14.2. Challenges
- 15. Market Trends & Developments
 - 15.1. Merger & Acquisition (If Any)
 - 15.2. Product Launches (If Any)
 - 15.3. Recent Developments
- 16. Japan Rare Disease Therapeutics Market: SWOT Analysis
- 17. Porter's Five Forces Analysis
 - 17.1. Competition in the Industry
 - 17.2. Potential of New Entrants
 - 17.3. Power of Suppliers
 - 17.4. Power of Customers
 - 17.5. Threat of Substitute Products
- 18. Competitive Landscape
 - 18.1. GlaxoSmithKline K.K.
 - 18.1.1. Business Overview
 - 18.1.2. Company Snapshot
 - 18.1.3. Products & Services
 - 18.1.4. Financials (As Reported)
 - 18.1.5. Recent Developments
 - 18.1.6. Key Personnel Details
 - 18.1.7. SWOT Analysis
 - 18.2. Sanofi K.K.
 - 18.3. Pfizer Japan Inc.
 - 18.4. Sun Pharma Japan Ltd.
 - 18.5. Novartis Pharma K.K.
 - 18.6. AstraZeneca K.K.
 - 18.7. Meiji Seika Pharma Co., Ltd.
 - 18.8. Merck Biopharma Co., Ltd.
 - 18.9. MSD K.K.
 - 18.10. Otsuka Pharmaceutical Co., Ltd.
- 19. Strategic Recommendations
- 20. About Us & Disclaimer

Japan Rare Disease Therapeutics Market By Therapeutic Area (Hematologic Diseases, Cancer, Infectious Diseases, Cardiovascular Diseases, Metabolic Diseases, Endocrine Diseases, Musculoskeletal Diseases, Others), By Route of Administration (Injectable, Oral, Others), By Drug Type (Biologics, Biosimilar, Small Molecules), By Distribution Channel (Specialty Pharmacies, Hospital Pharmacies, Online Pharmacies), By Region, Competition, Forecast & Opportunities, 2020-2030F

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