

Osteoarthritis Therapeutics Market Assessment, By Anatomy [Knee Osteoarthritis, Hip Osteoarthritis, Hand Osteoarthritis, Others], By Drug Type [Prescription Drugs, Over-the-counter Drugs], By Drug Class [Viscosupplementation Agents, Nonsteroidal Anti-inflammatory Drugs, Analgesics, Corticosteroids, Others], By Route of Administration [Oral, Parenteral, Topical], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Global osteoarthritis therapeutics market is projected to witness a CAGR of 8.80% during the forecast period 2024-2031, growing from USD 8.07 billion in 2023 to USD 15.85 billion in 2031. The market for osteoarthritis treatment is anticipated to keep growing under the influence of the growing disease burden, along with the heightened emphasis on advanced treatment options. Osteoarthritis is a degenerative joint disease characterized by the breakdown of cartilage, leading to pain, stiffness, and reduced mobility. It commonly affects weight-bearing joints such as knees and hips. Therapeutic approaches include lifestyle modifications such as exercise and weight management, pharmacological treatments such as analgesics and anti-inflammatories, and interventional therapies such as corticosteroid injections or viscosupplementation. In severe cases, surgical options, such as joint replacement, may be considered. The osteoarthritis therapeutic market is expanding rapidly due to the rising prevalence of the condition, particularly among aging populations. Demand for effective pain management options drives innovation in treatment modalities, including non-invasive and minimally invasive therapies. Ongoing research into disease-modifying treatments holds promise for future market expansion, aiming to provide lasting relief and improved joint function for affected individuals. The major challenges for this market include side effects associated with medicines and longer duration of treatment. However, the market thrives under driving forces coupled with regulatory approvals and drug launches. For instance, in March 2024, Pacira

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BioSciences announced that its gene therapy product candidate, PCRX-201, has received Regenerative Medicine Advanced Therapy (RMAT) designation from the Food and Drug Administration (FDA) for treating knee osteoarthritis. This marks the first gene therapy to achieve such designation in this area, supported by promising Phase 1 trial data.

Increasing Burden of Osteoarthritis to Create Demand for Therapeutics

An upsurge in the burden of osteoarthritis is expected to propel the demand for osteoarthritis therapeutics products. The aging population and increase in obesity rates lead to the prevalence of osteoarthritis rising steadily, especially among the older population. Higher awareness and better diagnostic techniques help patients visit hospitals at earlier stages and, thus, increase the therapeutic demand. Health care expenditure in this case tends to be higher. Therefore, the increased availability of these therapies will result in further research and development into innovative treatments targeting the disease at its root mechanism. Treatment personalization is being improved because of a shift towards more patient-centric approaches, alongside regulatory support for new therapies, to increase patient outcomes. For instance, according to an article published in The Lancet Rheumatology in September 2023, there will be an estimated 642 million individuals with knee osteoarthritis, 279 million individuals with hand osteoarthritis, 62.6 million individuals with hip osteoarthritis, and 118 million individuals with other types of osteoarthritis by 2050.

Advancements in Pain Therapeutics to Drive Market Growth

Recent developments in osteoarthritic pain therapeutics have greatly transformed the osteoarthritis therapeutics market. Wherein conventional drug development has concentrated mainly on providing relief of pain via the use of drugs, such as NSAIDs and corticosteroids, whilst new therapies target osteoarthritis pathophysiology. Among these emerging agents, biologics, such as monoclonal antibodies and gene therapies targeting specific inflammatory pathways, give way to more personalized and effective options for treatment. Approaches through regenerative medicine will include stem cell therapy and platelet-rich plasma injections. These are expected to further add to the patient's therapeutic options and, in the final analytical play, quality of life while changing the competitive landscape in the osteoarthritis therapeutics market. For instance, in November 2023, the University of Miami secured FDA approval for a groundbreaking study on genicular artery embolization (GAE) as a treatment for knee osteoarthritis. This minimally invasive procedure aims to reduce pain and inflammation, with patients reporting significant pain relief within a week. The study will be the first of its kind in South Florida, addressing a critical need for effective non-surgical options.

Viscosupplementation Agents to Dominate Market Share

The segment of viscosupplementation agents holds the leading market share of osteoarthritis therapeutics based on several compelling grounds, owing to targeted pain relief through restored viscosity of the synovial fluid, thereby enhancing joint lubrication and reducing friction. This mechanism is directly aimed at one of the primary actions of osteoarthritis, hence favored by patients and healthcare providers. Further, the rising prevalence of osteoarthritis, particularly in elderly populations, increases the need for safe, non-pharmacological interventions. Local therapies, such as viscosupplementation, are generally preferred over systemic drugs due to their local action and fewer systemic side effects. The advancement in formulation technology has improved the efficacy and extended duration of viscosupplementation treatment, which will contribute to market growth. Furthermore, innovative product launches from market players enhance the growth rate of the market. For instance, in February 2024, IBSA PHARMA LIMITED in the United Kingdom launched the SINOVIOL range, an innovative treatment for musculoskeletal conditions, particularly osteoarthritis. This advanced viscosupplementation product combines high and low molecular weight hyaluronic acid, enhancing joint lubrication and reducing pain. It aims to fill the treatment gap between conservative care and surgery, improving the quality of life for approximately 10 million arthritis patients in the United Kingdom.

North America to Dominate the Osteoarthritis Therapeutics Market Share

North America leads the share of the osteoarthritis therapeutics market as mostly the prevalence of the disease is at an all-time high due to the rate of obesity in people, thus requiring effective treatment. A developed healthcare infrastructure goes along with thorough research and development works that encourage innovation in osteoarthritis therapies, including pharmaceuticals and biologics. Furthermore, investments from pharmaceutical companies make more varied treatments possible-from pain management to joint injections. In addition, the FDA in North America supports the approval of new therapeutics, thus ensuring timely access to cutting-edge treatments. Lastly, the presence of a solid framework for insurance often means full or partial coverage of treatment costs for osteoarthritis. For instance, in April 2024, Paradigm Biopharmaceuticals Ltd. submitted essential

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documents to the USFDA to advance its Phase 3 trial for injectable pentosan polysulfate sodium (iPPS/Zilosul) aimed at treating osteoarthritis. This submission includes data from five nonclinical studies and a successful Phase 2 trial, with plans to begin enrollment in late 2024. The company anticipates FDA feedback within three months, potentially expediting its clinical development process.

Future Market Scenario (2024 - 2031F)

One area of transformation in the therapeutic osteoarthritis market is introducing a treatment via MedTech devices such as Apos. Clinically approved to reduce knee pain, Apos was launched in March 2024 and has been endorsed for the MedTech Funding Mandate by the National Health Service (NHS). This can lead to a smoother and faster route to effective treatments without waiting for the patient's plight to be addressed. Cost efficiency built into this device reduces patients' surgical interventions while improving their results, avoiding 74% of surgeries. The incorporation of such technologies is indicative of a broader trend towards value-based healthcare, which moves increasingly towards a more patient-centered approach, besides an improved quality of life. Apos is one of the exemplary illustrations of how innovative solutions can help address inadequacies well inherent within often non-standardized existing treatment pathways. However, healthcare systems progressing into a strong emphasis on efficiency, patient satisfaction, and advanced therapeutic options, including Apos, are probably going to be the driving factors toward future growth in the osteoarthritis market, where eventually, noninvasive treatments are going to be at its core. This marks a very promising horizon for patients and providers alike.

Key Players Landscape and Outlook

The medication available for osteoarthritis includes generic and branded medicines. Notable pharmaceutical companies are marketing the branded medicines while various local and global players provide generic drugs and analgesics, making the market slightly dynamic. Recent market activities include regulatory proceedings and announcements for business initiatives. In September 2024, Sun Pharmaceutical Industries Limited and Israel-based Moebius Medical Limited received fast-track designation from the USFDA for their non-opioid therapy MM-II, aimed at treating osteoarthritis knee pain. This designation allows for expedited review and potentially accelerated approval. The companies plan to initiate Phase 3 clinical trials and seek a CE Mark in the European Union. In April 2024, Crescent Innovations, Inc. announced the sale of its Poly-gamma-glutamic Acid (PgGA) technology related to osteoarthritis treatments, along with various intellectual property and know-how assets. PgGA was developed as the next generation of viscosupplements for treating degenerative joint disease. Unlike the current state-of-the-art osteoarthritis treatment, hyaluronic acid, PgGA has tripled the charge density, making it unique in its properties. Crescent Innovations has demonstrated, both in vitro and in vivo, that PgGA can significantly reduce matrix metalloproteinases (MMPs) and other inflammatory markers compared to hyaluronic acid.

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