Nasal Drug Delivery Market Assessment, By Dosage Form [Nasal Spray, Nasal Gel, Nasal Powder, Nasal Drop, Others], By Container Type [Pressurized Containers, Non-Pressurized Containers], By Application [Nasal Congestion, Anaphylaxis, Asthma, Others], By End-user [Hospital Pharmacies, Retail Pharmacies, Online Pharmacies], By Region, Opportunities and Forecast, 2018-2032F

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Report description:

Global nasal drug delivery market is projected to witness a CAGR of 6.99% during the forecast period 2025-2032, growing from USD 79.01 billion in 2024 to USD 135.59 billion in 2032. The market demand for nasal drug delivery is anticipated to thrive drastically in the forecast years due to the increasing prevalence of chronic diseases such as asthma and chronic obstructive pulmonary disease (COPD) and, additionally, the non-invasive nature of this mode of delivery.
Nasal drug delivery is gaining market growth due to its advantages, such as non-invasion, ease of use, and rapid start of action. This introductory path is particularly effective for treating respiratory and central nervous system (CNS) disorders, providing direct access to target sites with a minimum of systemic effects. The high prevalence of respiratory disorders drives the market; for example, the prevalence of chronic obstructive pulmonary disease is the fourth leading cause of death globally, responsible for 3.5 million deaths, or 5% of all deaths worldwide. Nearly 90% of COPD deaths in people under 70 years of age occur in low- and middle-income countries, where limited resources and high exposure to risk factors worsen outcomes. Tobacco use accounts for more than 70% of COPD cases in high-income countries, while in low- and middle-income countries, it contributes to 30-40% of cases, with household air pollution also a major risk factor. Furthermore, innovations in drug formulations and delivery technologies are fueling market growth.
For instance, in October 2024, Aero Pump GmbH and Resyca B.V. announced their collaboration in launching the Ultra Soft Nasal Pump Spray, featuring Medspray B.V.'s advanced nozzle technology for enhanced precision and comfort. The fine, uniform mist ensures optimal drug delivery, particularly for nose-to-brain therapies and vaccinations, offering a non-invasive solution with

improved absorption and reduced irritation for long-term use.

Increasing Prevalence of Chronic Respiratory and CNS Disease

The increasing prevalence of chronic respiratory and CNS disorders is a major growth driver for the global nasal drug delivery market. Along with factors like aging populations, environmental pollutants, and other factors, the increasing cases of respiratory diseases like asthma, COPD, migraines, and CNS disorders also need effective rapid-onset treatments. Nasal drug delivery systems uniquely meet the need for non-invasive, user-friendly administration with rapid absorption and targeted effects, especially for conditions such as respiratory and CNS conditions that demand fast relief from symptoms or targeted brain delivery. For instance, in June 2023, Seelos Therapeutics, Inc. announced the completion of enrollment in its registration-directed study of SLS-002 (intranasal racemic ketamine) for Acute Suicidal Ideation and Behavior (ASIB) in adults with Major Depressive Disorder (MDD). This clinical-stage biopharmaceutical company is focused on developing therapies for central nervous system disorders and rare diseases.

Advancements in Nasal Drug Delivery Technologies

Advancements in nasal drug delivery technologies are becoming an important growth factor in the nasal drug delivery market. Innovative configurations such as dose conversation systems and delivery devices increase the efficiency, accuracy, and convenience of patients in nasal administration. The development of nanoparticle nasal sprays, enhanced bioavailability formulations, and sustained release mechanisms is expanding the scope of nasal drug delivery beyond traditional applications, including biologics, vaccines, and drugs for chronic and acute diseases. These technological advances address major patient needs for rapid, non-invasive delivery, particularly in treating respiratory, central nervous system, and pain disorders, where ease of self-administration and rapid onset of action are essential. For instance, in October 2024, Indian scientists from the Institute of Nano Science and Technology (INST), Mohali, developed chitosan nano-aggregates for an efficient nasal drug delivery system for treating Central Nervous System Tuberculosis (CNS-TB), bypassing the blood-brain barrier (BBB). This breakthrough improves drug efficacy, offering a promising solution for a condition traditionally difficult to treat due to BBB limitations.

Non-Pressurized Container Segment to Dominate the Nasal Drug Delivery Market

The non-pressurized container segment is anticipated to dominate the global nasal drug delivery market because of its patient-friendly design, affordability, and ease of use. Particularly when treating chronic respiratory and central nervous system disorders, non-pressurized containers like nasal sprays and droppers provide a straightforward and practical method of administration that enhances patient compliance. Improvements in formulation stability, accurate dosage, and less environmental effect than pressured devices are further factors driving growth in this market. The non-pressurized container segment is anticipated to significantly dominate the market for nasal drug delivery due to the rising desire for self-administered and non-invasive treatments. For instance, in November 2023, Hovione expanded its nasal drug delivery capabilities by partnering with Industrial Design Consultancy Ltd (IDC) to develop two innovative nasal powder delivery devices-single-use and multidose. These devices offer targeted nasal deposition, faster onset of action, and simplified drug development using standard capsules and filling equipment, making them a promising solution for both local and CNS drug delivery.

North America Dominates Nasal Drug Delivery Market

North America is anticipated to dominate the global market for nasal drug delivery, mainly due to the higher incidence of chronic respiratory and CNS disorders and advanced healthcare infrastructure. In the United States, one of the top 10 causes of death is chronic obstructive pulmonary disease. This market also involves a strong demand for non-invasive treatment options. This region has robust research and development activities, the highest investments in innovative drug delivery technologies, and a supportive regulatory environment that facilitates new nasal formulations to gain approval. The adoption of self-administered therapies by the aging population across the world further strengthens North America's position in this market.

For instance, in August 2023, Tiziana Life Sciences plc received United States Food and Drug Administration clearance for its Investigational New Drug (IND) application to study intranasal foralumab in Alzheimer's disease. This novel treatment targets neuroinflammation caused by toxic protein accumulation in the brain, offering potential as a groundbreaking therapy for Alzheimer's disease.

Future Market Scenario (2025-2032F)

The global nasal drug delivery market has a very optimistic outlook because the advancement of delivery technology continues, with expanding applications in therapeutics and improved preference among patients for non-invasive administration. Because of

the growing chronic respiratory and CNS diseases, fast-acting, self-administered therapy is in demand, for which nasal drug delivery is perhaps one of the best available options. Investments in new formulations, including nanoparticle-based sprays and biologics, as well as advancement in targeted drug delivery to the brain for CNS treatments, are likely to help the market.
For instance, in August 2024, The United States Food and Drug Administration approved Neffy (epinephrine nasal spray) for the emergency treatment of life-threatening allergic reactions (anaphylaxis) in adults and pediatric patients weighing at least 30 kilograms. Neffy is the first epinephrine product for anaphylaxis that does not require injection, addressing a key unmet need by offering a non-invasive alternative, especially for those who may avoid or delay treatment due to fear of injections. This approval provides a new treatment option, improving access to rapid, life-saving care for anaphylaxis.
Key Players Landscape and Outlook
The nasal drug delivery market is marked by a dynamic and competitive landscape driven by key players executing strategic initiatives such as mergers, acquisitions, and collaborations. These actions and regulatory approvals for new products underscore the industry's strong focus on innovation and growth, positioning it for continued expansion. For instance, in April 2024, Amneal Pharmaceuticals, Inc. announced the availability of over-the-counter (OTC) Naloxone Hydrochloride (Naloxone HCl) Nasal Spray, 4mg, following FDA approval via Abbreviated New Drug Application (ANDA). Manufactured in the United States, this generic version of NARCAN HCl Nasal Spray is used to treat opioid overdoses, including those from heroin and fentanyl.
For instance, in March 2024, OptiNose US, Inc. announced that the United States Food and Drug Administration had approved XHANCE (fluticasone propionate) nasal spray for treating chronic rhinosinusitis without nasal polyps in adults aged 18 and older. Chronic rhinosinusitis affects around 30 million adults in the United States and significantly impairs quality of life, comparable to conditions like COPD or migraines.

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