

India Immunology Drugs Market By Drug Class (Monoclonal Antibodies (mAb), Antibody Drug Conjugates, Interferon and Cytokine therapies, Immunosuppressive medication, Others), By Indication (Arthritis, Plaque Psoriasis, Spondylitis, Inflammatory Bowel Disease, Transplant Rejection, Others), By End User (Hospitals & Clinics, Cancer Research Institute, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Report description:

India Immunology Drugs Market was valued at USD 2.65 Billion in 2024 and is expected to reach USD 3.98 Billion by 2030 with a CAGR of 7.08% during the forecast period. The Immunology Drugs Market refers to the global industry for medicinal products designed to treat, prevent, or mitigate diseases related to the immune system. This market includes drugs for a wide array of conditions such as rheumatoid arthritis, psoriasis, Crohn's disease, and various forms of immunodeficiencies. The sector has witnessed significant growth due to factors such as increasing prevalence of immunological disorders, advancements in biologic therapies, and the advent of biosimilars. It encompasses a broad spectrum of therapeutics, including monoclonal antibodies, vaccines, and immunosuppressive drugs.

In recent years, there has been a remarkable surge in research and development efforts to address the complex mechanisms underlying immune-related diseases. This has led to the discovery of novel targets and the development of innovative immunotherapies that show promising outcomes in clinical trials. The growing understanding of the immune system's intricate workings has paved the way for personalized medicine approaches, allowing for tailored treatments based on an individual's immune profile. The Immunology Drugs Market has witnessed collaborations between pharmaceutical companies, academic institutions, and research organizations to foster innovation and accelerate the development of breakthrough therapies. This

collaborative ecosystem has fueled the introduction of next-generation immunomodulatory drugs, aiming to provide safer and more effective treatment options for patients.

As the global population continues to face the burden of immune-related disorders, the Immunology Drugs Market is projected to experience sustained growth in the coming years. The demand for immunotherapies is anticipated to rise as healthcare systems focus on improving patient outcomes and quality of life. With ongoing advancements in technology and a deeper understanding of immunology, the future of this market holds great potential for transformative treatments that can revolutionize the way we combat immune-related diseases.

Key Market Drivers

Rising Burden of Chronic Diseases

India is currently experiencing a significant and alarming increase in the burden of chronic diseases, particularly autoimmune disorders and cancers. According to the International Agency for Research on Cancer (IARC), in 2022, India reported 1,413,316 new cancer cases and 916,827 cancer-related deaths.

This rise has led to an unprecedented demand for immunology drugs that can effectively combat these conditions. Recent research has shown that lifestyle-related diseases and an aging population are major contributors to this surge. Infections and environmental triggers have further exacerbated the situation, resulting in a higher prevalence of chronic inflammatory diseases. According to National Library of Medicine, About 21% of the elderly in India reportedly have at least one chronic disease.

Seventeen percent elderly in rural areas and 29% in urban areas suffer from a chronic disease. Hypertension and diabetes account for about 68% of all chronic diseases.

In response to this challenging scenario, there is a growing need for innovative and efficient treatments, further driving the demand for immunology drugs. These drugs play a crucial role in managing chronic conditions by reducing inflammation and modulating the immune response. As a result, pharmaceutical companies are now placing a higher priority on the development and distribution of these drugs within India. However, it is important to address several significant challenges to ensure that these life-saving drugs are accessible and affordable for those in need. The affordability and accessibility of immunology drugs must be tackled to ensure that they reach all segments of society. Despite these challenges, the increasing demand for immunology drugs is a clear indication of a proactive response to the escalating burden of chronic diseases in India.

Increasing Research in the Area of Next Generation Drugs

The field of immunology drugs in India is experiencing remarkable growth, driven by extensive research in the domain of next-generation drugs. Pioneering advancements in biomedical science are leading to the development of innovative therapeutics that specifically target immune-mediated diseases. With its robust pharmaceutical industry, India is at the forefront of this revolutionary progress. The surge in demand for immunology drugs is fueled by two key factors. The emergence of novel drug mechanisms that precisely target specific components of the immune system, offering enhanced efficacy and fewer side effects. The increasing prevalence of immune-related diseases in India, including rheumatoid arthritis and multiple sclerosis, necessitates the urgent need for advanced therapeutics.

In response to this demand, Indian pharmaceutical companies are heavily investing in research and development activities focused on next-generation immunology drugs. The government's support, through favorable policies and funding, has further catalyzed this growth. As a result, not only is the demand for immunology drugs rising, but India is also positioning itself as a global hub for immunology drug research and manufacturing. This remarkable progress in the field of immunology drugs in India signifies the country's commitment to advancing healthcare and addressing the growing medical needs of its population. With continued research and development, India is poised to make significant contributions to the field of immunology and improve the lives of countless individuals worldwide.

Increasing Focus on Targeted Therapies

The increasing focus on targeted therapies is significantly escalating the demand for immunology drugs in India. These therapies, meticulously designed to act specifically on immune responses associated with various diseases, have revolutionized the treatment landscape. They have shown remarkable efficacy in managing several conditions, particularly autoimmune and inflammatory diseases, which have been a growing burden in India. As the prevalence of these diseases continues to rise, there is a heightened need for effective and targeted treatment strategies.

Immunology drugs, with their precise action on immune pathways, present a promising solution in addressing these healthcare

challenges. The advent of personalized medicine, coupled with the government's push for better healthcare infrastructure and enhanced accessibility, further fuels the demand for these drugs. Awareness programs conducted by pharmaceutical companies and healthcare organizations have played a pivotal role in enlightening both healthcare providers and patients about the benefits of these therapies, reinforcing their adoption. Therefore, the focus on targeted therapies not only meets the evolving healthcare needs but also propels the growth of the immunology drugs market in India. This surge in demand marks the beginning of a new era in disease management and patient care, where personalized and targeted treatments take center stage.

Increased Focus on R&D

The burgeoning focus on research and development (R&D) in India has led to a significant uptick in the demand for immunology drugs in the country. With its globally recognized pharmaceutical sector known for generic drugs production, India is now making a transition towards the development of novel drugs, particularly in the immunology segment. This shift has been fueled by expanding healthcare infrastructure, increased government funding for R&D, and a growing talent pool of researchers specializing in immunology.

In October 2022, Roche inaugurated the company's second state-of-the-art Global Analytics and Technology Center of Excellence (GATE) in Hyderabad, in south India. The Swiss drug maker is developing data science and advanced analytics-related capabilities at GATE Center in Hyderabad and plans to expand its offerings to include forecasting, data management, DevOps etc., in the future, according to V Simpson Emmanuel, managing director and CEO of Roche Pharma India.

The rising prevalence of autoimmune and inflammatory diseases in the Indian population has intensified the need for effective immunology drugs. The increased investment in R&D has thus not only enhanced India's capacity to meet domestic demand but has also positioned it as a key player in the international immunology market. This growing focus on R&D is creating a fertile environment for the advancement of immunology and its applications in the Indian pharmaceutical industry. As India continues to prioritize R&D in the healthcare sector, it is paving the way for innovative breakthroughs in immunology. The collaboration between academia, industry, and research institutions is fostering a conducive ecosystem for the discovery and development of cutting-edge immunology drugs. This, in turn, showcases India's commitment to addressing the evolving healthcare needs of its population and contributing to the global advancements in the field of immunology.

Key Market Challenges

Stringent Regulatory Policies

Immunology drugs in India are facing a significant downturn in demand, primarily due to the stringent regulatory policies implemented by the government. These regulations, which are designed to ensure the safety, efficacy, and quality of these drugs, have become a major challenge for pharmaceutical companies operating in the country. The rigorous nature of these regulations imposes substantial costs of compliance, resulting in an inevitable increase in the overall price of immunology drugs. The time-consuming approval process further exacerbates the situation by causing delays in the launch of new drugs, leading to a decrease in their availability and subsequently, the demand.

The strict post-marketing surveillance requirements add to the burden faced by pharmaceutical companies as they have to allocate additional resources and incur additional costs to comply with these regulations. While it is undeniable that these regulations are crucial for safeguarding patient safety, their strictness, combined with the increased costs they entail, have started discouraging patients and healthcare providers, further contributing to the decline in the demand for immunology drugs in India. In order to address this issue, it is imperative for the government to strike a balance between ensuring patient safety and creating an environment that encourages innovation and growth in the pharmaceutical industry. This could involve streamlining the approval process, providing incentives for research and development, and exploring ways to reduce the compliance costs for pharmaceutical companies. By doing so, it will not only help revive the demand for immunology drugs but also foster the development of new and more effective treatments for patients in need.

Expensive Treatment Cost

In India, the high cost of immunology drugs is becoming a significant deterrent for many patients seeking treatment, leading to a decrease in demand. These drugs, which are essential in managing and treating autoimmune disorders, are often priced beyond the average individual's financial capacity, making them inaccessible to a large portion of the population, especially those in lower economic brackets. The prohibitive cost is primarily due to the intricate process of developing these highly specialized medicines, involving complex biotechnology and rigorous clinical trials. The expenses incurred in research and development, manufacturing,

and distribution are then passed on to the end consumers, further exacerbating the issue.

The lack of comprehensive health insurance coverage adds to the challenges faced by patients. Without adequate coverage, individuals are left to bear the burden of the high treatment costs, making it even more difficult for them to access these life-saving drugs. The high treatment cost has led to a significant drop in demand for immunology drugs, highlighting a pressing need for policy changes, price regulation, and increased healthcare funding. These measures are necessary to make such treatments accessible and affordable for all individuals who are in need, ensuring that no one is denied proper medical care due to financial constraints.

Key Market Trends

Increasing Prevalence of Immunological Disorders

India is witnessing a remarkable surge in the demand for immunology drugs, primarily attributed to the escalating prevalence of immunological disorders. Diseases like rheumatoid arthritis, psoriasis, and Crohn's disease, which are triggered by the immune system's abnormal response, are increasingly being reported across the country. This exponential increase in the incidence of such disorders has created an urgent need for effective treatment strategies, thereby driving the demand for immunology drugs. This surge in demand is also correlated with the heightened awareness and improved diagnosis of these disorders within the Indian population. With better access to healthcare facilities and advancements in medical technology, there has been a significant improvement in the early detection and treatment of immunological disorders. This, in turn, has further propelled the market for immunology drugs in the country. The introduction of biosimilars, which are affordable alternatives to costly biologic drugs, has played a pivotal role in making immunology drugs more accessible and affordable to a larger section of the population. This affordability factor has significantly contributed to fueling the demand for immunology drugs in India. The increasing prevalence of immunological disorders in India, coupled with improved awareness, accurate diagnosis, and the availability of affordable drugs, is driving the growing demand for immunology drugs in the country. These factors collectively paint a picture of an evolving healthcare landscape in India, where the need for effective immunology drugs continues to grow.

Innovation and New Product Launches

Innovation and new product launches in India's pharmaceutical sector are playing a significant and transformative role in increasing the demand for immunology drugs. This trend is driven by a combination of factors, including the country's growing burden of autoimmune and inflammatory diseases, the rise of cutting-edge research and development initiatives, and the increasing need for advanced drugs with improved efficacy and fewer side effects.

The entry of novel drugs into the market is particularly noteworthy, as they target previously unaddressed conditions or offer better management of existing diseases. This has led to a surge in demand for these drugs, as patients and healthcare providers seek more effective treatment options. Increased awareness and accessibility, supported by governmental health schemes and growing private investment, have further fueled the demand for immunology drugs in India. As a result, the landscape of immunology drugs in India is undergoing a significant transformation, driven by innovation and the introduction of new products. This transformation is not only benefiting patients by providing them with better treatment options, but it is also opening up new opportunities for pharmaceutical companies to expand their portfolios and contribute to the overall growth of the sector.

Segmental Insights

Drug Class Insights

Based on the drug class, monoclonal antibodies (mAb) currently hold a dominant position due to its versatile role in managing a wide range of immunological diseases. With its targeted approach and continuous efforts in research and development, the application scope of mAb is constantly expanding. This is driven by the need to address the evolving healthcare landscape and the increasing demand for personalized treatment options. It is worth noting that the market share of other drug classes, such as Antibody Drug Conjugates, Interferon and Cytokine therapies, Immunosuppressive medication, among others, is also on the rise. These advancements can be attributed to the progress in medical technology and the growing awareness of the importance of maintaining good health. As the healthcare industry continues to evolve, it is crucial to stay abreast of the latest developments in immunology drugs. The market is witnessing significant growth and offers promising opportunities for both pharmaceutical companies and healthcare professionals to contribute to the well-being of patients and society as a whole.

Indication Insights

Based on indication, the Arthritis segment is currently dominating the India Immunology Drugs Market. This can be attributed to

the high prevalence of arthritis, including rheumatoid and osteoarthritis, among the population. The rising awareness about the importance of early diagnosis and treatment has further fueled the growth of this segment in the market. Advancements in medical research and technology have led to the development of innovative immunology drugs specifically tailored to target arthritis-related inflammation and provide effective symptom relief. These drugs not only help manage pain and improve mobility but also slow down disease progression, enhancing the quality of life for arthritis patients. With an increasing number of individuals seeking these advanced solutions for managing arthritis, the demand for immunology drugs in India is expected to continue its upward trajectory.

The India Immunology Drugs Market is also benefitting from strategic partnerships and collaborations between pharmaceutical companies and research institutions. This collaboration has facilitated the exchange of knowledge and resources, leading to the development of more targeted and efficient immunology drugs. Government initiatives and healthcare policies focused on improving access to healthcare services and raising awareness about arthritis and its treatment options have played a significant role in driving the growth of the immunology drugs market in India. These initiatives aim to reduce the burden of arthritis on individuals and society as a whole, emphasizing the importance of early intervention and comprehensive care. The India Immunology Drugs Market is witnessing significant growth in the Arthritis segment, driven by factors such as high prevalence, increased awareness, advancements in medical research, and supportive government initiatives. The development of innovative immunology drugs tailored to address arthritis-related inflammation has improved the quality of life for arthritis patients and is expected to continue meeting the growing demand for effective treatment options in the future.

Regional Insights

Based on the region, North India is anticipated to hold a dominant position. This region boasts a robust healthcare infrastructure, equipped with state-of-the-art medical facilities and a skilled workforce, which enables efficient delivery of healthcare services to a large population. North India's geographical location and well-connected transportation network facilitate the smooth distribution of immunology drugs across the region. The high prevalence of autoimmune diseases in North India, including rheumatoid arthritis, lupus, and psoriasis, further contributes to its prominence in the market. The region's healthcare institutions are at the forefront of research and treatment for these conditions, attracting patients from across the country. The availability of specialized immunology drugs and a strong network of healthcare facilities, including hospitals, clinics, and diagnostic centers, ensures that patients in North India have access to the latest treatments and comprehensive care. Considering these factors, North India is expected to maintain its leading position in the India Immunology Drugs Market for the foreseeable future. The region's continuous efforts in healthcare advancement and its commitment to improving patient outcomes make it a key player in driving the growth and development of the immunology drugs market in India.

Key Market Players

- Panacea Biotec Ltd.
- Bristol-Myers Squibb India Pvt Ltd.
- Wockhardt Ltd.
- Pfizer Ltd.
- Sanofi India Ltd.
- GlaxoSmithKline Pharmaceuticals Ltd.
- Abbott India Ltd.
- Genetech Pvt Ltd.
- Novartis India Ltd.
- Allergan India Pvt Ltd.

Report Scope:

In this report, the India Immunology Drugs Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□ India Immunology Drugs Market, By Drug Class:

- o Monoclonal Antibodies (mAb)
- o Antibody Drug Conjugates
- o Interferon and Cytokine therapies

- o Immunosuppressive medication

- o Others

□□India Immunology Drugs Market, By Indication:

- o Arthritis

- o Plaque Psoriasis

- o Spondylitis

- o Inflammatory Bowel Disease

- o Transplant Rejection

- o Others

□□India Immunology Drugs Market, By End User:

- o Hospitals

- o Clinics

- o Cancer Research Institute

- o Others

□□India Immunology Drugs Market, By Region:

- o North

- o South

- o West

- o East

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Immunology Drugs Market.

Available Customizations:

India Immunology Drugs 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).

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