

Global Onychomycosis Treatment - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 126 pages | Mordor Intelligence

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Report description:

The Global Onychomycosis Treatment Market size is estimated at USD 3.51 billion in 2025, and is expected to reach USD 4.37 billion by 2030, at a CAGR of 4.46% during the forecast period (2025-2030).

Clinical examination, dermoscopy, and mycological examination were recommended for all patients with suspected onychomycosis prior to the COVID-19 pandemic. Non-urgent in-patient visits are being postponed as the COVID-19 pandemic spreads, and telemedicine may be used to handle some elements of onychomycosis diagnosis and treatment. Telemedicine can be used to assess individuals with suspected onychomycosis, although it's best for those who have already had their mycological confirmation. As a result, the COVID-19 pandemic is projected to cause a short-term interruption in the market. However, the revenue growth rate is predicted to recover during the forecast period, and the global onychomycosis market is expected to increase at a double-digit rate.

Onychomycosis traditionally referred to a non-dermatophytic infection of the nail but is now used as a general term to denote any fungal nail infection (tinea unguium specifically describes a dermatophytic invasion of the nail plate). Onychomycosis is of different types, such as superficial onychomycosis, distal and lateral subungual onychomycosis, proximal subungual onychomycosis, endonyx onychomycosis, and total dystrophic onychomycosis. Only around half of nail dystrophies are caused by a fungus; hence onychomycosis accounts for one-third of fungal skin infections.

The increasing geriatric population, rising prevalence of onychomycosis, diabetic population worldwide, and growing awareness about the potential threats of onychomycosis are the key driving factors in the onychomycosis treatment market. According to an article titled, 'High prevalence of mixed infections in global onychomycosis,' published in 2020, onychomycosis is estimated to occur at a prevalence of 10% worldwide, with the infecting organism most commonly being *Trichophyton rubrum*. In addition,

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according to World Health Organization's (WHO) data in 2021, by 2030, one out of every six persons on the globe will be aged 60 years or older. The number of people aged 60 years and more is expected to rise from 1 billion in 2020 to 1.4 billion by 2050. By 2050, the global population of adults aged 60 years and above will have doubled (2.1 billion).

Onychomycosis Treatment Market Trends

The Drugs Segment is Expected to Hold a Major Share in the Onychomycosis Treatment Market

Some of the drugs available for the treatment of onychomycosis are terbinafine, ciclopirox, Jublia, Fluconazole, Penlac, cicloclan, ketoconazole, Sporanox, Itraconazole, Kerydin, efinaconazole, griseofulvin, and so on. For onychomycosis treatment, drugs remain the first-line treatment choice and hold a major market share owing to a consistently high success rate.

Elewski and Charif's onychomycosis report states that approximately 40% of the elderly population have onychomycosis and a reduction in nail growth rate ranges from about 40% to 60% in persons aged above 65 years. Furthermore, onychomycosis affects approximately 2% to 26% of different populations globally. However, less than 30% of individuals infected with onychomycosis seek medical advice or treatment in developed countries.

The drugs segment holds a significant share in the onychomycosis treatment market. It is anticipated to show a similar trend over the forecast period due to the products' highly effective nature and easy availability. In July 2021, Lupin received approval to launch Tavaborole Topical Solution 5% in the US from the US Food and Drug Administration (FDA).

Due to the COVID-19 pandemic, the distribution of drugs was disrupted worldwide due to the supply chain disruptions and was expected to have an impact in 2020. However, in late 2020, 2021, and further years, the onychomycosis market was expected to recover and even show positive growth over the forecast period.

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

North America is expected to hold a major share in the global onychomycosis treatment market due to high drug costs, rising geriatric population, and increasing prevalence of onychomycosis and diabetic patient populations in this region. According to the Census Bureau's 2020 population estimates, more than 55 million Americans are aged 65 years or older, of which one-fourth live in one of three states, namely, California, Florida, and Texas. Seven other states, including Georgia, Illinois, Michigan, New York, account for roughly another quarter of the 65+ population.

The reasons for the age-related increase in onychomycosis include a variety of factors, like repeated nail trauma, poor peripheral circulation, diabetes, suboptimal immune function, longer exposure to pathogenic fungi, inactivity, or the inability to cut toenails or maintain good foot care. Various strategies, such as research and development, mergers and acquisitions, and product launches, are being adopted by domestic companies to strengthen their market position.

In October 2020, US-headquartered Pfizer Inc. announced that it had begun clinical studies concerning onychomycosis. The first one involved a study determining whether the AN2690 topical solution is an effective treatment for onychomycosis of the toenail. The second one was an open-label study to evaluate the safety and pharmacokinetics of the tavaborole 5% topical solution to treat distal subungual onychomycosis of the toenail in both children and adolescents.

On the other hand, the COVID-19 pandemic has resulted in decreased diagnosis and impacted the sales revenue of drugs and other treatment methods for onychomycosis as hospitals and primary care centers shifted their focus to COVID-19 patients.

Onychomycosis Treatment Industry Overview

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The onychomycosis treatment market is fragmented and competitive and consists of several major players. Companies are focusing on developments, collaborations, and product launches to strengthen their market position. For instance, in April 2020, the US Food and Drug Administration expanded the approval of Jublia manufactured by Bausch Health. Jublia is a topical solution used to treat onychomycosis in the toenail(s) in patients aged six years and above.

Some of the players currently dominating the market are Bausch Health Companies Inc. (Valeant Pharmaceuticals Inc.), Galderma SA, Novartis AG, Pfizer Inc., Moberg Pharma AB, Johnson & Johnson, Bayer AG, Dr. Reddy's Laboratories Ltd, Cipla Ltd, Medimetrix Pharmaceuticals Inc., and Lumenis Ltd.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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