

## **India Tuberculosis Treatment Market Size and Share Outlook - Forecast Trends and Growth Analysis Report (2025-2034)**

Market Report | 2025-06-20 | 250 pages | EMR Inc.

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### **Report description:**

The India tuberculosis treatment market was valued at USD 381.60 Million in 2024 , driven by the rising focus on multidrug-resistant tuberculosis management and robust government initiatives in the region. The market is anticipated to grow at a CAGR of 4.20% during the forecast period of 2025-2034, with the values likely to reach USD 575.82 Million by 2034 . The expanding access to free diagnostics and treatment under national programs, along with growing adoption of rapid molecular tests and digital adherence technologies for improved TB care, are likely to drive the market growth in the forecast period.

### **India Tuberculosis Treatment Market Overview**

The market is expected to grow significantly in the coming years, driven by government efforts, advances in drug development, and increased public awareness. The rise of drug-resistant tuberculosis is likely to augment demand for second-line therapies, while first-line treatments will remain the backbone of the national TB control strategy. With proactive government measures, ongoing collaborations, and technological innovations, the market is projected to positively impact the market dynamics in the forecast period.

### **India Tuberculosis Treatment Market Growth Drivers**

#### **Rising Tuberculosis Incidence to Boost Market Growth in India**

According to the World Health Organization's Global Tuberculosis Report 2023, India remains the country with the highest tuberculosis burden globally, representing 26% of the world's total tuberculosis cases. The report also reveals that 2.8 million new TB cases were reported in India in 2023, with the incidence rate estimated to be 195 per 1,00,000 individuals. This high incidence of tuberculosis in India is significantly driving the demand for both first-line and second-line therapies, thereby boosting market growth.

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## India Tuberculosis Treatment Market Trends

The market is witnessing several trends, including a rising focus on combating drug-resistant tuberculosis, supported by proactive government initiatives.

### Rising Emphasis on Managing Drug-Resistant Tuberculosis Likely to Boost Market Growth

In March 2025, it was announced that the Department of Biotechnology (DBT) had successfully completed genomic sequencing for 10,000 samples (about a third of its target of 32,500 *Mycobacterium tuberculosis* strains) as part of efforts to improve the understanding of drug-resistant TB and uncover unique genomic characteristics specific to India. Preliminary findings reveal that 7% of these samples are resistant to a single drug. This growing emphasis on managing drug-resistant tuberculosis represents a key market trend, likely to drive continued growth in the tuberculosis treatment market in India.

### Proactive Government Initiatives to Elevate the India Tuberculosis Treatment Market Value

A major trend driving the tuberculosis treatment market in India is robust government initiatives. For instance, since the launch of the 100-day TB Mukht Bharat campaign on December 7, 2024, 1.59 lakh new tuberculosis patients have been identified, according to India's Union Health Minister. The campaign is being carried out in 347 key districts across 33 states and union territories and is focused on accelerating progress toward TB elimination as part of the Sustainable Development Goals.

## India Tuberculosis Treatment Market Segmentation

The market report offers a detailed analysis of the market based on the following segments:

### Market Breakup by Disease Type

- Active TB
- Latent TB

### Market Breakup by Therapy

- First-Line Therapy
- Second-Line Therapy

### Market Breakup by Dosage Form

- Tablets
- Capsules
- Injections
- Others

### Market Breakup by Route of Administration

- Oral
- Parenteral
- Others

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## Market Breakup by End User

- Hospital Pharmacies
- Retail Pharmacies
- Online Pharmacies
- Others

## India Tuberculosis Treatment Market Share

### The First-Line Therapy Segment Expected to Dominate the Market Share

Based on therapy, the market is segmented into first-line therapy and second-line therapy. First-line therapy is expected to hold a substantial market share due to its owing to its widespread use in treating drug-sensitive tuberculosis. This therapy typically includes a combination of rifampicin, isoniazid, ethambutol, and pyrazinamide. As these drugs have been in use for decades, they are readily available and cost-effective, making them a crucial part of India's National Tuberculosis Elimination Programme (NTEP).

## India Tuberculosis Treatment Market Analysis by Region

In India, Uttar Pradesh accounts for a significant portion of India's tuberculosis treatment volumes, particularly in the private sector. This Indian state is a priority for targeted interventions and public health initiatives, owing to its large population and tuberculosis burden. Further, Maharashtra also holds a high market value. The state has implemented successful strategies to engage private healthcare providers in tuberculosis care, improving treatment outcomes, and is anticipated to support market expansion.

## Leading Players in the India Tuberculosis Treatment Market

The key features of the market report comprise patent analysis, grant analysis, funding and investment analysis, and strategic initiatives by the leading players. The major companies in the market are as follows:

### Sanofi

Sanofi plays a significant role in the Indian market through its supply of essential anti-tuberculosis drugs. It has historically been a key manufacturer of rifampicin-based formulations, which are central to the standard tuberculosis treatment regimen. Sanofi also works closely with various public health initiatives to ensure the availability and affordability of tuberculosis medications in India, particularly in resource-limited settings.

### Pfizer Inc.

Pfizer contributes to the India tuberculosis treatment market growth through its broader work in infectious diseases and health system support. The company has invested in strengthening disease awareness, diagnostics, and infrastructure, which indirectly benefits TB detection and management. Pfizer's portfolio of anti-infectives and vaccines supports comorbidity management and prevention of secondary infections in TB patients.

### Johnson & Johnson Services Inc.

Johnson & Johnson, through its pharmaceutical arm Janssen, is a key player in the treatment of multidrug-resistant tuberculosis

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(MDR-TB) in India. The company's drug bedaquiline, one of the first new anti-TB medications in decades, has been endorsed by the WHO and adopted in India's national treatment guidelines.

Novartis AG

Novartis AG is a global leader in the pharmaceutical industry, known for its portfolio in oncology, cardiovascular diseases, ophthalmology, and immunology. While Novartis does not have a direct tuberculosis drug in its primary commercial portfolio, it still plays an important role in the fight against tuberculosis, particularly through global health initiatives. Novartis has been actively involved in public-private partnerships and research collaborations focused on neglected diseases, including tuberculosis.

Other key players in the market include GlaxoSmithKline plc, Merck & Co., Inc., Lupin, Cipla Ltd., Macleods Pharmaceuticals Ltd., and Sun Pharmaceutical Industries Ltd.

#### Key Questions Answered in the India Tuberculosis Treatment Market Report

- What was the India tuberculosis treatment market value in 2024?
- What is the India tuberculosis treatment market forecast outlook for 2025-2034?
- What is the market segmentation based on disease type?
- What is the market breakup based on the therapy?
- What is the market breakup based on the dosage form?
- How is the market segmented based on route of administration?
- How is the market divided based on the end user?
- What are the major factors aiding the India tuberculosis treatment market demand?
- How has the market performed so far, and how is it anticipated to perform in the coming years?
- What are the market's major drivers, opportunities, and restraints?
- What are the major India tuberculosis treatment market trends?
- Which disease type is expected to dominate the market segment?
- Which therapy is expected to dominate the market segment?
- Which dosage form is projected to lead the market segment?
- Which route of administration is anticipated to drive the market segment?
- Which end user is likely to dominate the market segment?
- Who are the key players involved in the India tuberculosis treatment market?
- What is the patent landscape of the market?
- What are the current unmet needs and challenges in the market?
- How are partnerships, collaborations, mergers, and acquisitions among the key market players shaping the market dynamics?

More Insights on

Tuberculosis Treatment Market

United States Tuberculosis Treatment Market

Japan Tuberculosis Treatment Market

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