

# MARKET REPORT



Global Gastrointestinal Drug Market to 2022 - Pipeline Characterized by Emerging Biologic Therapies, While TNF Inhibitors and PPIs Continue to Dominate Therapy Landscape

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# Global Gastrointestinal Drug Market to 2022 - Pipeline Characterized by Emerging Biologic Therapies, While TNF Inhibitors and PPIs Continue to Dominate Therapy Landscape

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## Summary

Disease and disorders involving the gastrointestinal system are among the most common conditions encountered worldwide, and many of them can have a significant impact on quality of life. The direct and indirect socio-economic burden associated with gastrointestinal disorders is profound. The direct costs of medical consultations and treatments in the US for gastroesophageal reflux disease alone are estimated to amount to \$9.3 billion, while the indirect costs due to absenteeism and impairment in work performance total \$75 billion (Chait, 2010).

Despite the significant global socio-economic burden, many gastrointestinal disorders are still poorly understood, and there is a significant unmet need for novel, safe and effective therapies, as treatment options are often lacking, causing many patients to be dissatisfied with their treatment. The unmet need and demand for better treatments and the high prevalence of digestive conditions make the gastrointestinal market an attractive candidate for therapeutic development.

This report covers all gastrointestinal disorders, but there is a particular focus on three key diseases: gastroesophageal reflux disease, irritable bowel syndrome and inflammatory bowel disease. The global gastrointestinal market was valued at \$35.7 billion in 2015 and is projected to grow at a compound annual growth rate (CAGR) of 4.45%, reaching \$48.4 billion in 2022. Proton pump inhibitors (PPIs) and tumor necrosis factor (TNF)- $\alpha$  inhibitors generate the largest revenues and continue to retain commercial prominence. Key drivers of market growth will be the uptake of recently approved premium products, rising prevalence, and promising late-stage products, including a number of biologic therapies that are expected to be highly valuable.

## Scope

The gastrointestinal market landscape is expected to change substantially with the advent of promising novel pipeline products.

There are 937 gastrointestinal pipeline products in active development, of which small molecules and biologics account for 53% and 38%, respectively.

- Which molecular targets are most prominent within the pipeline?
- How do the key indications differ in terms of molecule type?
- How does the composition of the pipeline compare with that of the existing market?
- What mechanisms of action are most common for pipeline drugs?

Global revenue for the gastrointestinal market is forecast to grow at a CAGR of 4.45%, from \$35.7 billion in 2015

to \$48.4 billion in 2022.

- Which products will be the biggest drivers for market growth?
- Will the current market leaders retain their dominance over the forecast period, and how is their revenue share of the gastrointestinal market set to change?
- What CAGR will these companies register in the forecast period?

Reasons to buy

This report will allow you to -

- Understand the current clinical and commercial landscape by considering disease pathogenesis, diagnosis, prognosis and the treatment options available at each stage of diagnosis.
- Visualize the composition of the gastrointestinal market across each indication, in terms of dominant molecule types and targets, highlighting the key commercial assets and players.
- Analyze the gastrointestinal pipeline, stratifying it by stage of development, molecule type and molecular target and providing a granular breakdown across key indications.
- Understand the growth in patient epidemiology and market revenue for the gastrointestinal market globally and across the key players and product types.
- Stratify the market in terms of the split between generic and premium products and assess the role of these product types in the treatment of the various gastrointestinal conditions.
- Identify commercial opportunities in the gastrointestinal deals landscape by analyzing trends in licensing and co-development deals.

## Additional Details

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