

# MARKET REPORT



Tuberculosis Drugs Market, By Therapy (First Line Therapy, Second Line Therapy, and Combination Therapy), By Disease Type (Active Tuberculosis, Latent Tuberculosis, and Drug-Resistant Tuberculosis), By Distribution Channel (Retail Pharmacy, Hospital Pharmacy, and Online Pharmacy), and By Geography (EU, NA, APAC, LATAM, and MEA) – Analysis, Size, Share, Trends, & Forecast from 2020-2026

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## REPORT HIGHLIGHT

The tuberculosis drugs market was valued at USD 1,045.8 million by 2019, growing with 5.2% CAGR during the forecast period, 2020-2026.

## REPORT HIGHLIGHT

Tuberculosis or TB is a contagious bacterial infection (caused by bacteria called “Mycobacterium Tuberculosis”) that usually attacks the patient’s lungs. TB in general terms is a key health concern worldwide. In 2018, according to a report by the World Health Organization (WHO) around 10 million people were affected by tuberculosis. These cases were identified from all age groups. Thus, WHO identifies TB as the 9th leading cause of patient’s death. Tuberculosis disease is caused due to infection of Mycobacterium tuberculosis bacteria to the human lungs.

## Market Dynamics

The rising number of patients suffering from tuberculosis coupled with favorable government support on spreading awareness regarding this disease is driving the industry growth. According to the World Health Organization (WHO) 2019 report, more than 10 million people are affected with tuberculosis condition every year, worldwide. The condition is a leading cause of death from a single infectious agent, accounting for one of the top 10 causes of death globally. Thus, the demand for TB therapeutics is set to increase over the forecast period, driving the market growth. Additionally, collaborations and assistance from international organizations including TB Alliance, WHO, and UNICEF to lower the burden caused due to the disease and addressing unmet medical needs, which is estimated to fuel market growth in the coming years. Also, the introduction of new anti-TB drug regimens, improvement in diagnostic tests in low-resource settings, such as drug susceptibility testing are some of the potential driving factors for the market growth. Furthermore, recommendations in favor of developing shorter regimens and the use of fourth-generation fluoroquinolones for MDR-TB are considered to be leading to changes in the TB drug market.

Despite such growth inducing factors, drug shortage especially in developing countries is estimated to create challenges for the growth of the market. Nonetheless, the introduction of a Multi-Drug Resistant Tuberculosis Program is likely to offer several opportunities for growth in the coming years. In addition, the high cost associated with the treatment of second-line TB will hamper the market growth. For example, as per the U.S. Department of Health & Human Services’ data, the average direct cost for the treatment of drug-susceptible TB

would be around USD 16,000, USD 150,000 for MDR-TB, and USD 510,000 for the treatment of extensively drug-resistant TB (XDR-TB).

### Therapy Takeaway

By therapy, tuberculosis drugs market is segmented into first-line (serve the Drug Susceptible or Sensitive (DS) TB patient), second-line (serve the Drug Resistant (DR) TB patient), and combination therapy. Among which, second-line TB therapy accounted for the highest revenue share as the cost of this therapy, particularly for Active TB is on the decline. The second line therapy is further segmented into injectable anti-tuberculosis drugs and fluoroquinolones. Some of the examples of the second-line category include moxifloxacin, levofloxacin, Bedaquiline, Linezolid, and Delamanid. Also, in 2019, Pretomanid is newly introduced second-line products, indicated for the treatment of drug-resistant TB.

On the other side, first-line therapy follows an upward growth with the developing countries are witnessing an increase in DS-TB incidence in both ATB and LTB forms. The segment is further segmented into rifampicin, ethambutol, isoniazid, pyrazinamide, and streptomycin.

### Disease Type Takeaways

By disease type, the global tuberculosis drug industry is segmented into active tuberculosis, latent tuberculosis, and drug-resistant tuberculosis. Of these, the active tuberculosis segment held a substantial share owing to a rising number of active TB cases. According to the Centers for Disease Control and Prevention (CDC), more than 10 million people globally develop active TB on an annual basis. The ATB form involves symptomatic expression of Mycobacterium tuberculosis infection which is detected easily due to perceivable symptoms. On the contrary, latent tuberculosis is projected to grow with promising CAGR over the study period. The World Health Organization (WHO) defined latent TB as a state of the persistent immune response which is stimulated by M. tuberculosis antigens without clinically manifested active TB.

### Distribution Channel Takeaways

Based on the distribution channel segment, the market is bifurcated into retail pharmacy, hospital pharmacy, and online pharmacy. Of these, the market is dominated by the hospital segment as the demand for medicines is increased due to a substantial rise in patients globally, particularly in the underdeveloped countries. Whereas, the online category is projected to grow with the fastest growth rate during the study period.

### Regional Takeaway

Regionally, the overall market for tuberculosis drugs is divided into North America, Middle East & Africa, Asia Pacific, Latin America, and Europe. Of these, Asia Pacific dominated the market in the year 2019 owing to a higher prevalence of the disease in the region. According to the WHO, around one-third of the patients of the world are from the Asia Pacific region, which is creating a robust need for better treatment options.

Additionally, the Middle East & Africa region is estimated to witness the fastest growth of the market owing to an increase in patient pool coupled with the availability of treatments in the region. Furthermore, developed regions such as North America and Europe accounted for the significant revenue share. It is noted that the majority of the TB cases in these regions registered from foreign-born people who are entering these countries as well as those exposed to TB due to travel to regions.

## COVID-19 Impact

The tuberculosis drug market is witnessing a few adverse effects due to the outbreak of COVID-19 globally. Patients are experiencing the unavailability of treatments and drugs due to lockdown in major areas of the world. Change in the role of hospitals treating tuberculosis is also a major concern, as there is an inevitable interruption in diagnostic, which creates risk for other house members, as they are more prone to the disease. The outbreak also results in lower enthusiasm among patients regarding regular check-ups and treatments. Such factors are witnessed to impact adversely from the past few months and may continue until the situation becomes normal regarding COVID.

## Key Vendor Takeaway

The key players operating in the global tuberculosis drugs market include Pfizer, Inc., Novartis AG, Macleods Pharmaceuticals, Bayer AG, Cadila Healthcare, Lupin Limited, AstraZeneca plc, Johnson & Johnson, and Otsuka Pharmaceutical Co. Ltd.

These companies are looking for strategic mergers and acquisitions to expand their customer reach. Additionally, the companies are trying to enter into partnerships with several healthcare organizations for improving the drug and treatments. Further, the approvals of newer drugs and treatments by the US Food and Drug Administration (FDA) are majorly benefiting the players. For instance, in August 2019, the U.S. FDA approved a novel compound for highly drug-resistant forms of TB named "Pretomanid". This molecule was developed by the non-profit TB Alliance and approved under the Limited Population Pathway for Antibacterial and Antifungal Drugs (LPAD pathway).

The market size and forecast for each segment and sub-segments has been considered as below:

Historical Year - 2015 to 2018

Base Year - 2019

Estimated Year - 2020

Projected Year - 2026

## TARGET AUDIENCE

Traders, Distributors, and Suppliers

Manufacturers

Government and Regional Agencies

Research Organizations

Consultants

Distributors

## SCOPE OF THE REPORT

The scope of this report covers the market by its major segments, which include as follows:

## TUBERCULOSIS DRUGS MARKET KEY PLAYERS

AstraZeneca plc

Johnson & Johnson

Bayer AG

Cadila Healthcare Ltd

Lupin Limited

Pfizer, Inc.

Novartis AG

Macleods Pharmaceuticals

Otsuka Pharmaceutical Co., Ltd.

Other players

## TUBERCULOSIS DRUGS MARKET, BY THERAPY

First-Line Therapy

Isoniazid

Pyrazinamide

Rifampicin

Ethambutol

Streptomycin

Second-Line Therapy

Fluoroquinolones

Injectable Anti-tuberculosis Drugs

Combination Therapy

## TUBERCULOSIS DRUGS MARKET, BY DISEASE TYPE

Latent Tuberculosis

Active Tuberculosis

Drug-Resistant Tuberculosis

## TUBERCULOSIS DRUGS MARKET, BY DISTRIBUTION CHANNEL

Hospital Pharmacy

Retail Pharmacy

Online Pharmacy

## TUBERCULOSIS DRUGS MARKET, BY REGION

North America

The U.S.

Canada

Europe

Germany

France

Italy

Spain

United Kingdom

Rest of Europe

Asia Pacific

India

China

South Korea

Japan

Singapore

Rest of APAC

Latin America

Brazil

Mexico

Argentina

Rest of LATAM

The Middle East and Africa

Saudi Arabia

United Arab Emirates

Rest of MEA

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These experts are dedicated to creating concrete market data analysis in various industries such as Healthcare, Bulk Chemicals, Semiconductors and Electronics, Foods and Beverages. We strive to develop meaningful and evidence-based research data that helps our clients, empowering organizations and brands of all sizes with strategic analysis, accurate data, and consumer trends.

We aim to be the number one choice for various clients who require credible data to make vital business decisions. We wish to be a trusted and reliable analytics partner to major business organizations.

We understand that critical business decisions can be taken only when verified, authentic information is available. Therefore, our experts work meticulously to provide our clients with the accurate data, so that they need not spend time in verifying it.

It is also our goal to help our clients ignore traditional research methods that require a large amount of capital, manpower, and most important of it all – the time. We know that these factors are precious to a company and always follow the latest research techniques that produce the required result in a short span of time.



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Figure Brazil Tuberculosis Drugs Market Size, Forecast And Trend Analysis, 2015 To 2026 (Usd Million)

FIGURE Mexico Tuberculosis Drugs Market size, forecast and trend analysis, 2015 to 2026 (USD Million)

Figure Argentina Tuberculosis Drugs Market Size, Forecast And Trend Analysis, 2015 To 2026 (Usd Million)

Figure Rest Of Latam Tuberculosis Drugs Market Size, Forecast And Trend Analysis, 2015 To 2026 (Usd Million)

Figure Middle East And Africa Tuberculosis Drugs Market Size, Forecast And Trend Analysis, 2015 To 2026 (Usd Million)

Figure Middle East And Africa Tuberculosis Drugs Market Share Analysis By Country, 2018

Figure Saudi Arabia Tuberculosis Drugs Market Size, Forecast And Trend Analysis, 2015 To 2026 (Usd Million)

Figure United Arab Emirates Tuberculosis Drugs Market Size, Forecast And Trend Analysis, 2015 To 2026 (Usd Million)



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