

Pulmonary Drug Delivery Systems Market - Global Industry Analysis, Size, Share, Growth, Trends and Forecast, 2013 – 2019

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REPORT DESCRIPTION

Pulmonary Drug Delivery Systems Market Expected to Reach USD 28.7 Billion Globally in 2019: Transparency Market Research

According to a new market report published by Transparency Market Research "**Pulmonary Drug Delivery Systems Market(Products- Metered Dose Inhalers, Dry Powder Inhalers and Nebulizers; Applications- Asthma, COPD and Cystic Fibrosis) - Global Industry Analysis, Size, Share, Growth, Trends and Forecast, 2013 - 2019**" the global pulmonary drug delivery systems market was valued at USD 21.03billion in 2012 and is expected to grow at a CAGR of 4.5% from 2013 to 2019, to reach an estimated value of USD 28.70billion in 2019.

Pulmonary drug delivery systems use the respiratory tract to deliver medications to treat diseases such as asthma, chronic obstructive pulmonary disease (COPD) and cystic fibrosis. The history of use of these systems dates back to over 60 years ago, when these systems were initially indicated for treating only respiratory diseases - asthma and COPD. Continued development in this area facilitated their application in the treatment of other diseases as well, including cystic fibrosis and diabetes. Exubera was the first inhalable insulin launched by Pfizer Ltd. and Nektar Pharma for treating diabetes, in 2006. However, owing to its poor sales performance, Exubera was withdrawn from the market within a year of its launch which led other partnerships such as Alkermes/Eli Lilly and Aradigm/Novo Nordisk to abandon the development process of inhalable insulin therapies. Currently, Afrezza by MannKind

Corporation is the only inhalable insulin under review by the U.S. FDA and is likely to be approved for marketing in the U.S. by mid-2014.

The global market for pulmonary drug delivery systems includes metered dose inhalers (MDIs), dry powder inhalers (DPIs) and nebulizers. Initially, MDIs used chlorofluorocarbons (CFCs) as propellants. Later due to rising environmental concerns and pressure from Montreal Protocol (1987) recommendation to phase out CFCs, manufacturers started using hydrofluoroalkanes (HFAs) that are considered as safe propellants causing negligible threat of ozone depletion. MDIs accounted for the largest share (56.8%) of the total global pulmonary drug delivery systems market in 2012 and this segment is expected to grow at a CAGR relatively lower than that for DPIs and nebulizer market segments. This is primarily because of the environmental concerns related with the use of CFCs, which led to ban on CFC-based inhalers. Although manufacturers have now started using HFAs the fact that HFAs also emit gases causing ozone layer depletion has led manufacturers to shift their focus more towards the development of DPIs. During the forecast period 2013 to 2019, DPIs are expected to witness greater demand than MDIs owing to propellant free nature of these systems. The market for nebulizers has been anticipated as the fastest growing segment of the pulmonary drug delivery systems market mainly due to the technical advances leading to portability of these devices and rising demand for home based care. The global pulmonary drug delivery systems market has also been segmented on the basis of their application in treating various diseases such as asthma, COPD and cystic fibrosis.

Among the four major geographies of the world, North America and Europe accounted for the first and second largest market shares in 2012 of the global pulmonary drug delivery systems market. The market in these regions is characterized by a range of factors such as patent expiry of many blockbuster inhaler brands, increasing prevalence of asthma and COPD, focus on reducing treatment costs, growing environmental concerns and aging population. Asia-Pacific held the third largest share of the global pulmonary drug delivery systems market in 2012. The region being home to more than half of the world's population represents a large pool of patients suffering from respiratory diseases such as asthma and COPD, and thus, represents a high growth potential market for pulmonary drug delivery systems, estimated to grow at a CAGR of 6.6% during the forecast period. Emerging economies of India and China are expected to favor the positive growth of pulmonary drug delivery systems market in the region by contributing to the rise in healthcare expenditure.

The global market for pulmonary drug delivery systems is dominated by companies such as GlaxoSmithKline, plc, Boehringer Ingelheim, AstraZeneca, Merck & Co., Philips Respironics and Omron Healthcare. These players collectively accounted for more than 75% of the global pulmonary drug delivery systems market revenue in 2012. Some other players operating in this market include Novartis AG, CareFusion Corporation, 3M Health Care, PARI Respiratory Equipment, Inc., Sunovion Pharmaceuticals Inc., Allied Healthcare Products, Inc., and GF Health Products Inc.

The global pulmonary drug delivery systems market is segmented as follows:

Pulmonary Drug Delivery Systems Market, by Product Type

- Metered Dose Inhalers (MDIs)
- Dry Powder Inhalers (DPIs)
- Nebulizers

Pulmonary Drug Delivery Systems Market, by Application

- Asthma
- Chronic Obstructive Pulmonary Disease (COPD)
- Cystic Fibrosis

Pulmonary Drug Delivery Systems Market, by Geography

- North America
- Europe
- Asia-Pacific
- Rest of the World (RoW)

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