

## Gastro-Market Analysis 2020

Dr. László Herszényi

Gastro is the branch of medicine Related to the GI (Gastrointestinal) tract (stomach and intestines) and the accessory organs of digestion (from the mouth to the anus). Focused on the digestive system and its disorders. Some of the conditions treated under this specialty include but are not limited to: Crohn's disease, Gastroesophageal reflux disease (GERD), inflammatory bowel disease, irritable bowel syndrome, peptic ulcer disease, celiac disease, colon cancer, heartburn, gastric cancer, diverticulitis, and ulcerative colitis.

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A wide range of new generation therapeutics targets that include novel small molecules and cellular therapy are currently under investigation. These include to facitinib, ustekinumab, mongersen, and vedolizumab. This influx is anticipated to be a consequence of high prevalence of gastrointestinal diseases globally. Vedolizumab is emerging as a first-line biologic therapy for Crohn's disease. Currently, the U.S. FDA has approved Humira, Amjevita, Cimzia, Remicade, Renflexis, Inflectra, Tysabri, and Entyvio for the treatment of Crohn's disease.

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### Top Gastroenterology companies

- Allergan Pharmaceuticals
- Boston Scientific
- Exact Sciences Corp. (colorectal cancer)
- Fujifilm Medical Systems USA
- Inters cope
- Johnson & Johnson
- Motus GI
- Olympus Corp. of the Americas
- Takeda Pharmaceuticals USA
- US Endoscopy Group

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Some studies have indicated that biologics exhibit greater long-term efficiency. According to a study conducted by University of Chicago, usage of biologics has resulted in an overall decrease in the number of surgeries by approximately 40.0%, emergency room visits by 60.0%, and hospitalizations by 50.0%. The increasing consumption of biologics for inflammatory bowel diseases (IBD) will be one of the major factors that will have a positive impact on the growth of the gastrointestinal therapeutics market size in the coming years. The emergence of biosimilar and the adoption of biosimilar as they contain active pharmaceutical ingredients that are identical to their originator biologic compounds and are also less expensive than biologics will gain traction in this market.

The global gastroparesis drugs market will accelerate at a CAGR of 3% between 2017-2021. Fast track approvals and acquisitions to change the phase of the market and the introduction of novel ways for the treatment of gastroparesis symptoms are the emerging trends which will gain traction during the forecast period. These trends will positively impact the market's growth.

The growing preference for minimally invasive (MI) procedures will drive the growth prospects for the global gastrointestinal stents market during the forecast period. Generally, MI surgeries have low-risk complications and other benefits such as reduced costs, shorter hospital stay, faster recovery, lesser pain, fewer post-surgery infections, reduced incision marks, bleeding control, minimal complications, and heightened accuracy. The size of the global gastrointestinal therapeutics market is expected to reach USD 13.8 billion by 2020, accelerating at a CAGR of 6.5% between 2015-2020. This growth in market size is attributed to numerous factors including increasing consumption of biologics, tentative approval of late stage molecules, development of novel therapies using innovative technologies, and improved diagnostic tools increasing the treatment-seeking population. Additionally, a sudden increase in the number of gastric surgeries across the globe is directly impacting the growth of post-surgical gastroparesis cases across the globe, which will directly propel growth within the gastroparesis drugs market

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over the next few years. Due to this primary growth factor, the global gastroparesis drugs market will increase USD 940 million between 2016-2021, exceeding USD 7.1 billion in market size by the end of the forecast period. Other factors driving the growth of this market include unmet needs in the industry to increase the R&D in the field and the rising cases of diabetes fuelling the prevalence of diabetic gastroparesis. Other insights provided within Technavio's gastroenterology market reports include:

- Allergan Pharmaceuticals
- Boston Scientific
- Cogentin Medical
- EndoChoice
- EndoGastric Solutions
- InterscopePentax Medical USA
- Physicians Endoscopy
- Synergy Pharmaceuticals
- Salix Pharmaceuticals
- Shaili Endoscopy
- Takeda Pharmaceuticals USA
- US Endoscopy Group

