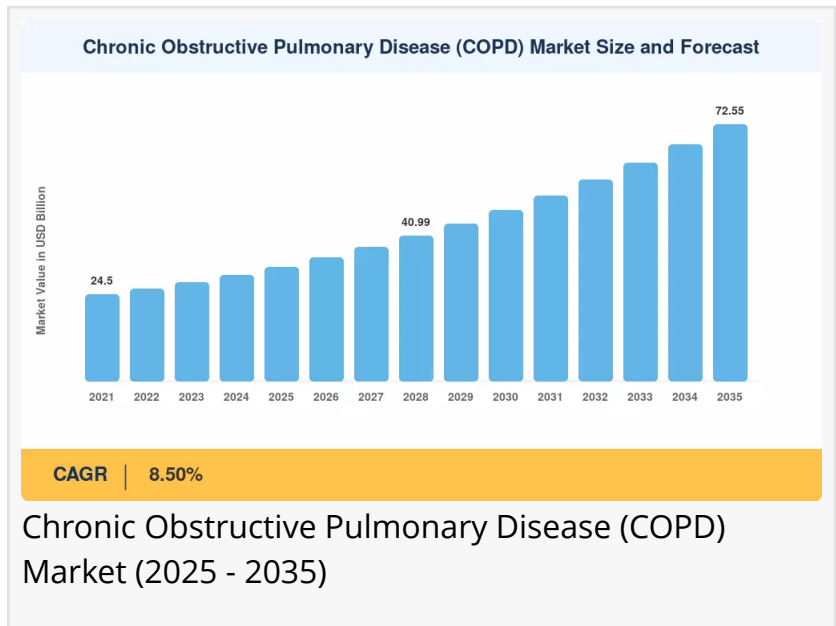


Chronic Obstructive Pulmonary Disease (COPD) Market to reach USD 72.55 Billion by 2035 at 8.50% CAGR

COPD Market to Surge from USD 32.10 Billion in 2025 to USD 72.55 Billion by 2035-By Rising Disease Prevalence, Triple-Combination Inhalers

NY, CA, UNITED STATES, September 18, 2026 /EINPresswire.com/ -- As per Market Research Future, the [global Chronic Obstructive Pulmonary Disease \(COPD\) Market size](#) is projected to reach USD 72.55 Billion by 2035 from USD 32.10 Billion in 2025, at a CAGR of 8.50% during the forecast period 2025--2035. The market is projected to grow from USD 34.82 Billion in 2026 to the 2035 endpoint.



The 8.50% CAGR---anchored by structural shifts in chronic respiratory disease management---is propelled by three converging forces: the rising global prevalence of COPD among aging populations, with the WHO's 2024 Global Burden of Disease update estimating that COPD affects more than 480 million adults worldwide, driving healthcare providers to increasingly adopt advanced maintenance therapies for superior exacerbation control and quality of life; advancements in treatment paradigms, particularly triple-combination inhalers combining LABA, LAMA, and ICS in a single device and first-in-class biologics targeting eosinophilic COPD phenotypes, which significantly improve patient adherence and clinical outcomes; and the integration of connected health technologies, including smart inhalers and remote patient monitoring reimbursed under Medicare, that enhance adherence tracking, early exacerbation detection, and home-based care delivery.

Global pharmaceutical companies and health authorities are amplifying this momentum. GlaxoSmithKline anchors the triple-therapy category with Trelegy Ellipta, while Sanofi/Regeneron's dupilumab became the first FDA-approved biologic for COPD in September 2024, opening a projected USD 3 billion revenue opportunity by 2030. The European

Commission's F-gas Regulation phase-down, effective through 2030, is compelling manufacturers to invest over USD 2 billion collectively in low-GWP inhaler redesigns, and public-health spending directed at chronic respiratory diseases exceeded USD 14 billion across OECD countries in fiscal year 2024. These forces are creating the clinical infrastructure and patient demand on which the COPD Market depends.

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Key Market Trends & Growth Drivers

Rising Demand for Triple-Combination Inhaler Therapy

The market is witnessing an increasing demand for single-inhaler triple therapy (SITT). As guideline recommendations continue to shift toward earlier escalation of combination therapy, more clinicians are prescribing fixed-dose LABA/LAMA/ICS products. Global SITT revenues exceeded USD 8.9 Billion in 2024, with formulary coverage spanning more than 85% of US commercial health plans. This trend indicates a shift in treatment patterns toward proactive exacerbation prevention, with triple therapy expanding average prescription values by approximately 40% over three years. GlaxoSmithKline continues advancing product development through next-generation triple-combination therapies while strengthening its respiratory franchise.

Advancements in Biologics for COPD Phenotypes

Innovations in biologic therapy are becoming a hallmark of the industry. Pharmaceutical companies are exploring various monoclonal antibody pathways, including anti-IL-4/IL-13, anti-IL-5, anti-TSLP, and anti-IL-33. These advancements aim to address treatable traits in inflammatory COPD subtypes, potentially leading to better exacerbation outcomes and increased market penetration. The market is expected to capture USD 3--5 billion of new biologic spending by 2030, with premium pricing likely in the range of USD 15,000--25,000 per patient per year. Sanofi/Regeneron continues leading this category with dupilumab, the first biologic to show statistically significant exacerbation reductions in eosinophilic COPD.

Integration of Connected Inhalers and Remote Monitoring

The incorporation of digital health technologies into the industry is gaining traction. Tools such as Bluetooth-enabled inhaler sensors and remote spirometry platforms are being utilized to monitor patient adherence and facilitate intervention before exacerbations worsen. Real-world evidence published in The Lancet Respiratory Medicine showed a 58% improvement in adherence among connected-inhaler users. CMS finalized reimbursement codes for Remote Patient Monitoring of chronic respiratory conditions, enabling providers to bill CPT 99457/99458

for connected pulse oximetry and spirometry data review. Boehringer Ingelheim continues investing in connected-device partnerships, while ResMed's Propeller Health platform monetises adherence data across the ecosystem.

Increasing Prevalence of COPD Among Aging Populations

The rising incidence of COPD is a primary driver. According to the WHO's 2024 Global Burden of Disease update, COPD affects more than 480 million adults globally, with aging populations and persistent risk-factor exposure sustaining the patient pool. The market is projected to expand as healthcare systems scale spirometry infrastructure and bring undiagnosed patients into treatment pathways. Fewer than 30% of COPD cases are diagnosed in Sub-Saharan Africa and South Asia, underscoring both the access challenge and the growth runway for innovative solutions.

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Market Segment Insights

BY PRODUCT TYPE

Drug Class Therapies: Largest segment with 69.50% share in 2024, driven by strong uptake of fixed-dose LABA/LAMA/ICS combinations such as Trelegy Ellipta and Breztri Aerosphere. GlaxoSmithKline continues expanding its triple-therapy leadership through sustained product innovation.

Monitoring Devices: Fastest-growing segment at 9.60% CAGR through 2035, propelled by remote patient monitoring reimbursement codes introduced by CMS. ResMed continues strengthening connected monitoring through cellular-enabled devices.

Consumables & Accessories: Expanding at 8.00% CAGR, fueled by recurring replacement cycles for nebulizer kits and spacer devices.

Diagnostic Devices: Valued at USD 3.42 Billion in 2024, reflecting screening guideline expansion and primary-care spirometry rollout.

BY COPD TYPE

Chronic Bronchitis: Largest segment by clinical presentation, driven by high prevalence of productive chronic cough and recurring exacerbation episodes requiring maintenance therapy.

Emphysema: Significant and growing share, supported by lung-volume-reduction procedures,

oxygen therapy demand, and surgical intervention pathways for advanced disease.

BY TREATMENT TYPE

Drugs (Bronchodilators): Largest segment, anchored by long-acting beta2-agonists and long-acting muscarinic antagonists. AstraZeneca continues strengthening combination inhaler distribution through portfolio expansion.

Anti-Inflammatory Drugs: Fastest-growing treatment class, as inhaled corticosteroids embedded in triple therapy and biologic entrants reshape the anti-inflammatory landscape.

Oxygen Therapy: Significant share, driven by long-term oxygen therapy demand and portable concentrator adoption in home-based care models.

Surgery: Smaller but significant share, reflecting lung volume reduction and bullectomy procedures for carefully selected advanced patients.

BY END USER

Hospitals & Clinics: Largest segment with 83.30% share in 2024, due to resource-intensive acute exacerbation episodes requiring nebulized therapy, supplemental oxygen, and emergency diagnostics.

Homecare Settings: Fastest-growing segment at 7.30% CAGR through 2035, as payers shift acute exacerbation management to outpatient and home-based models. Novartis continues investing in outcomes-linked contracts and home-monitoring integration.

Other End Users: Generated USD 1.10 Billion in 2024, driven by occupational health programs and community screening initiatives.

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Regional Outlook

North America --- Market Leader in Innovation

North America leads with 40.80% of global revenue, generating around USD 13.1 Billion. The region's growth is driven by robust insurance reimbursement and high diagnostic penetration. According to CMS, the Inflation Reduction Act's Part D redesign, effective 2025, caps out-of-pocket costs for inhaler therapies at USD 2,000 annually, expanding treatment affordability for

an estimated 3.8 million Medicare beneficiaries. The competitive landscape is characterized by continuous innovation and biologic launches among leading pharmaceutical companies.

Europe --- Second Largest Market

Europe contributed an estimated USD 9.15 Billion in 2024, representing the second-largest regional market with a 28.50% share. The region benefits from supportive reimbursement for respiratory innovation and the EU Pharmaceutical Strategy, while the EU HTA Regulation's joint clinical assessments accelerate access decisions. The European Commission's F-gas Regulation mandates a 2050 deadline for HFA-134a phase-out in metered-dose inhalers, driving the low-GWP transition. Leading countries include Germany, the UK, and France, where major pharmaceutical companies such as GSK, AstraZeneca, and Chiesi are heavily invested.

Asia-Pacific --- Rapidly Growing Market Segment

The Asia-Pacific region is the fastest-growing market at a 7.90% CAGR. The growth is driven by China and India scaling primary-care spirometry infrastructure, with China's National Reimbursement Drug List adding three new COPD combination therapies in 2024 and India's production-linked incentive scheme attracting USD 800 million in domestic inhalation device manufacturing investment through 2027. Countries like China and India are experiencing a surge in diagnosed prevalence, supported by government initiatives such as Ayushman Bharat and Healthy China 2030. The competitive landscape is evolving with companies like Cipla leading emerging-market access.

South America and Middle East & Africa --- Untapped Potential

South America was valued at USD 1.98 Billion in 2024, with Brazil anchoring regional demand through SUS formulary inclusion of long-acting muscarinic antagonists. The Middle East & Africa region is growing at a 5.80% CAGR, driven by Gulf state investment in specialized respiratory centres, Saudi Arabia's Vision 2030 healthcare transformation, and NGO-funded diagnostic campaigns. Countries like Saudi Arabia and South Africa are leading the way, with a growing presence of international pharmaceutical companies.

Competitive Landscape and Recent Developments

The COPD market is characterized by moderate concentration and rapid innovation, driven by increasing prevalence and the biologics pipeline worldwide. The top five companies command an estimated 55--62% of global revenue, with a handful of large pharmaceutical companies holding dominant positions in inhalers while device and digital-health specialists occupy fragmented niches.

KEY COMPANIES AND RECENT MILESTONES

GlaxoSmithKline (GB): Holds an estimated 14--18% revenue share as triple-therapy market leader with Trelegy Ellipta, Anoro, and Nucala. Continues advancing biologic expansion alongside its blockbuster inhaler franchise.

Sanofi/Regeneron (FR/US) (September 2024): Received FDA approval for dupilumab in eosinophilic COPD, marking the first biologic indicated for COPD management and opening a projected USD 3 billion revenue opportunity by 2030.

European Commission (January 2025): Published updated F-gas Regulation implementation guidelines, establishing a 2050 deadline for HFA-134a phase-out in metered-dose inhalers across all member states.

Chiesi Farmaceutici (IT) (August 2024): Completed first commercial-scale production runs of its HFA-152a reformulated Trimbrow inhaler at its Parma facility, positioning as the first mover in low-GWP pMDI delivery in Europe.

Other Key Players: AstraZeneca (GB), Boehringer Ingelheim (DE), Novartis (CH), Teva Pharmaceutical (IL), Viatris (US), Cipla (IN), ResMed (US).

Future Outlook: 2025--2035

The COPD Market is projected to reach USD 72.55 billion by 2035, growing at a CAGR of 8.50%, driven by rising disease prevalence, triple-combination inhaler adoption, and the shift to home-based respiratory care.

New opportunities lie in:

- Expansion of biologics beyond eosinophilic subtypes into neutrophilic and mixed-inflammatory phenotypes
- Development of digital therapeutics and AI-enabled exacerbation prediction platforms
- Investment in emerging-market spirometry infrastructure and green low-GWP inhaler reformulations

By 2035, the COPD Market is expected to achieve substantial growth and innovation, with biomarker-guided precision medicine reshaping treatment pathways.

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