

Global Hereditary Angioedema Therapeutics Market Size study, by Treatment Type (C-1 Esterase Inhibitor, Kallikrein Inhibitor), Route of Administration (Oral, Parenteral), Age Group (Pediatric, Adult), Distribution Channel (Hospital Pharmacies, Online Pharmacies) and Regional Forecasts 2022-2032

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Abstracts

Global Hereditary Angioedema (HAE) Therapeutics Market is valued approximately at USD 4.1 billion in 2023 and is anticipated to grow with a vigorous CAGR of more than 9.20% over the forecast period 2024–2032. Hereditary angioedema, a rare but potentially life-threatening genetic disorder, manifests through sudden episodes of severe swelling in various parts of the body. As awareness increases and genetic screening becomes more prevalent, the demand for highly targeted therapies continues to rise. This has placed HAE at the forefront of innovation in the rare disease treatment landscape. Fueled by technological advancements and research collaborations, pharmaceutical companies are launching next-generation inhibitors that are transforming acute and prophylactic treatment paradigms.

The market's acceleration is driven by the evolution of treatment from conventional corticosteroids and antifibrinolytics to more refined and safer options such as C1-esterase inhibitors and kallikrein inhibitors. These agents offer improved efficacy with fewer side effects and longer half-lives, which drastically enhances patient quality of life and adherence. Furthermore, the introduction of oral medications as a replacement for intravenous or subcutaneous routes has widened access and reduced treatment burdens. This therapeutic shift reflects a broader industry trend toward personalization and convenience in chronic disease management, which resonates deeply with HAE patients managing lifelong conditions.

Parallel to therapeutic innovations, regulatory bodies have facilitated accelerated approvals of breakthrough drugs, catalyzing faster market penetration. Companies are strategically diversifying their product pipelines with both acute and prophylactic indications to cover a broader patient base. In addition, pricing strategies, patient assistance programs, and collaborations with rare disease advocacy groups are being actively leveraged to enhance market adoption. With a growing pediatric patient pool and increasing awareness among clinicians, there's a measurable uptick in early diagnosis rates, further bolstering the demand for long-term, well-tolerated therapies.

Regionally, North America dominates the HAE therapeutics market owing to early product availability, favorable reimbursement systems, and robust patient registries. The United States, in particular, demonstrates strong market penetration with widespread clinical trial activity and an established network of rare disease specialists. Europe follows closely behind, propelled by collaborative research frameworks and government support for orphan drug development. Meanwhile, Asia Pacific is expected to experience the highest growth rate, fueled by expanding healthcare infrastructure, rising rare disease literacy, and the ongoing rollout of genomic medicine in nations like Japan, South Korea, and India.

Major market player included in this report are:

CSL Behring

Takeda Pharmaceutical Company Limited

Pharming Group N.V.

BioCryst Pharmaceuticals, Inc.

Ionis Pharmaceuticals, Inc.

KalVista Pharmaceuticals, Inc.

Attune Pharmaceuticals, Inc.

Intellia Therapeutics, Inc.

Adverum Biotechnologies, Inc.

Arrowhead Pharmaceuticals, Inc.

HAE Therapeutics

Amgen Inc.

AstraZeneca

Regeneron Pharmaceuticals, Inc.

F. Hoffmann-La Roche Ltd.

The detailed segments and sub-segment of the market are explained below:

By Treatment Type

C-1 Esterase Inhibitor

Kallikrein Inhibitor

By Route of Administration

Oral

Parenteral

By Age Group

Pediatric

Adult

By Distribution Channel

Hospital Pharmacies

Online Pharmacies

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Rest of Latin America

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

Years considered for the study are as follows:

Historical year – 2022

Base year – 2023

Forecast period – 2024 to 2032

Key Takeaways:

Market Estimates & Forecast for 10 years from 2022 to 2032.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major

regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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