

Global Phenylketonuria Treatment Market Size study, by PKU Type (Classic, Mild, Moderate, Hyperphenylalaninemia), by Treatment Type (Drug Therapy, Dietary Management), by Age Group (Pediatrics, Adults), by Route of Administration, by End-user, and Regional Forecasts 2022-2032

<https://marketpublishers.com/r/GDC1913608F5EN.html>

Date: May 2025

Pages: 285

Price: US\$ 3,750.00 (Single User License)

ID: GDC1913608F5EN

Abstracts

The Global Phenylketonuria Treatment Market is valued approximately at USD 0.73 billion in 2023 and is projected to expand with a steady compound annual growth rate (CAGR) of 7.20% over the forecast period from 2024 to 2032. Phenylketonuria (PKU), a rare inherited metabolic disorder caused by a deficiency in the enzyme phenylalanine hydroxylase, requires lifelong management to avoid severe neurological damage. Treatment solutions range from dietary interventions to pharmacological therapies that help regulate phenylalanine levels in the blood. With increasing newborn screening initiatives and better diagnostic infrastructure globally, the identification and subsequent treatment of PKU are seeing significant improvements, positioning this market for sustained growth.

Several transformative forces are catalyzing growth in the PKU treatment market. There is a rising emphasis on personalized medicine and nutritional genomics that aims to tailor therapies based on individual genetic profiles. Regulatory approvals of enzyme substitution therapies and amino acid supplements, such as sapropterin dihydrochloride and pegvaliase, are expanding the therapeutic toolbox available to clinicians. Moreover, heightened awareness around early intervention and the growing availability of specialized low-protein foods and medical nutrition products are reshaping how PKU is managed across various age groups. However, the high cost of drug therapies and the complexity of strict dietary adherence remain formidable challenges, especially in

developing nations.

Drug therapy continues to dominate the treatment landscape, thanks to its ability to substantially reduce blood phenylalanine levels and improve patient outcomes. Dietary management remains critical, particularly among pediatric patients, with lifelong low-protein diets supported by medical food and nutritional supplementation. Oral administration remains the most preferred route due to convenience, although ongoing innovations in gene therapies and enzyme replacement modalities may introduce more advanced, potentially curative alternatives in the coming years. The market is also witnessing a rise in research collaborations aimed at improving therapeutic efficacy and long-term patient compliance.

Regionally, North America leads the global phenylketonuria treatment market due to its advanced healthcare infrastructure, early adoption of innovative treatments, and strong regulatory support for rare disease therapies. Europe follows closely, driven by well-established neonatal screening programs and a high level of public health funding. Meanwhile, the Asia Pacific region is poised for the fastest growth owing to increasing awareness, expanding healthcare access, and supportive government initiatives targeting rare disease management. Countries like China and India are investing in newborn screening infrastructure, which is expected to contribute significantly to early diagnosis and treatment uptake.

Major market player included in this report are:

BioMarin Pharmaceutical Inc.

Cambrooke Therapeutics Inc.

Nutricia North America

Codexis, Inc.

Dr. Sch?r AG

Mead Johnson & Company, LLC

Vitaflo International Ltd.

Merck KGaA

SOM Innovation Biotech

Medtronic Plc

Ajinomoto Cambrooke, Inc.

Cargill, Inc.

Abbott Laboratories

Reckitt Benckiser Group plc

Sanofi S.A.

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

By PKU Type:

Classic

Mild

Moderate

Hyperphenylalaninemia

By Treatment Type:

Drug Therapy

Dietary Management

By Age Group:

Pediatrics

Adults

By Route of Administration:

Oral

Others

By End-user:

Hospitals

Clinics

Homecare

Others

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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