

Global Duchenne Muscular Dystrophy Market Research Report 2026(Status and Outlook)

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Abstracts

Duchenne Muscular Dystrophy is an x-linked genetic disorder that affects mostly boys. In Duchenne, boys begin to show signs of muscle weakness as early as two to five years of age. The disease gradually weakens the skeletal or voluntary muscles in the arms, legs and trunk. Due to progressive muscle weakness, Duchenne patients are often wheelchair bound between the ages of seven and 13 years old. At a later stage, the boys' respiratory and cardiac muscles are also affected and for most boys, respiratory and cardiac failure are major causes of death, often prevalent by the age of 20. Global Duchenne Muscular Dystrophy key players include Sarepta Therapeutics, PTC Therapeutics, etc. North America is the largest market, with a share over 70%, followed by Europe, and Japan, both have a share over 25 percent. In terms of product, Exondys 51 is the largest segment, with a share over 55%. And in terms of application, the largest application is Hospitals, followed by Clinics, Home Care, etc. The Duchenne muscular dystrophy (DMD) market is primarily driven by the following factors:

1. Disease Burden and Epidemiological Data
 - 1.1 Incidence and Patient Population Global Data: DMD is a rare, X-linked genetic disease with a global incidence of approximately 6 cases per 100,000 people, with the majority of patients being male (due to recessive inheritance of the X chromosome, females require two defective copies to develop the disease). China Data: The incidence of DMD in China is approximately 1 in 3,853, with approximately 60,000 to 70,000 patients nationwide. The majority of patients are children and adolescents, with the peak incidence occurring between the ages of 3 and 5 years. Regional Distribution: Europe (Sweden and Norway), North America (the United States and Canada), and China are the most prevalent regions, with the Asia-Pacific region (such as Australia and Japan) contributing approximately 30% of clinical trials.
 - 1.2 Disease Characteristics and Impact Symptoms and Prognosis: Patients typically experience delayed motor development (e.g., difficulty sitting and walking) at 2-3 years of age, lose the ability to walk around 12 years of age, and ultimately die from

respiratory or cardiopulmonary failure. The average life expectancy is approximately 40 years. Complications: Approximately 30% of patients experience mild intellectual disability, and skeletal deformities (such as scoliosis) and muscle atrophy significantly impact their quality of life.

2. Treatment Advances and Drugs in Development

2.1 Marketed Drugs

Corticosteroids: Corticosteroids such as deflazacort (Emflaza) and vamorolone are traditional treatments that slow disease progression through their anti-inflammatory effects, but they can also cause side effects (such as weight gain and growth suppression).

Exon-skipping therapy: Antisense oligonucleotides (ASOs) are used to skip the mutated exon, restoring some dystrophin function. Approved drugs include: Exondys 51 (exon 51 skipping, affecting 13% of DMD patients), Vyondys 53 (exon 53 skipping, affecting 8%), and Amondys 45 (exon 45 skipping). Viltepsiso (exon 53 skipping, manufactured by Nippon Shinyaku Co., Ltd.).

Gene Therapy: Elevidys (SRP-9001) is the first approved gene therapy for DMD. It delivers the dystrophin gene via an AAV vector. Its indication will be expanded to patients aged 4 years and older (regardless of ambulatory status) in 2024.

2.2 Drugs and Technologies in Development

Gene Therapy: Several companies (such as Sarepta Therapeutics and Roche) are advancing gene therapies to address the underlying genetic defect.

Cell Therapy and Gene Editing: Gene editing tools such as CRISPR technology have shown promise in preclinical studies but have yet to enter large-scale application.

HDAC inhibitors: For example, givinostat (Duvyzat) inhibits histone deacetylases to slow muscle degeneration and was approved by the FDA in 2024 for patients aged 6 years and older.

3. Policy Support and Orphan Drug Designation

3.1 Global Policy Differences

US: The FDA has approved several DMD drugs (such as Exondys 51 and Elevidys) through accelerated approval, but requires confirmatory trials to verify efficacy. The European Union (EU) has refused to renew approval for some drugs (such as Exondys 51), while the UK's MHRA has retained access to some drugs, reflecting regional policy differences. China has included DMD in its first list of rare diseases, providing dedicated funding to support research and development, and promoting priority review and reimbursement of new drugs (such as vamorolone).

3.2 Orphan Drug Incentives

Tax Incentives and Expedited Approval: Most countries use orphan drug designation (such as the US Orphan Drug Act) to provide tax breaks, research and development subsidies, and fast-track approvals, reducing R&D risks for companies.

Safety Net Programs: Some countries (such as France and Germany) waive economic analysis for drugs with minimal budgetary impact, accelerating patient access.

4. Patient Needs and Organizational Activities

4.1 Patient Demands and Quality of Life

Evolving Treatment Needs: Patients and families have a strong demand for treatments that reduce the side effects of traditional hormones (such as newer dissociative steroids like vamorolone), driving the development of innovative therapies.

Raising Disease Awareness: Patient organizations (such as the Duchenne Muscular

Dystrophy Association) are raising public awareness of DMD through advocacy, advocating for more treatment options and medical insurance coverage.

4.2 Optimizing Clinical Management

Multidisciplinary Integrated Management: For example, Beijing Children's Hospital has established a multidisciplinary DMD team (including neurology, rehabilitation, and cardiology) to provide personalized treatment throughout the lifespan.

Early Diagnosis and Intervention: Motor function assessments, muscle enzyme profiles (creatine kinase elevation of 20-200 times), and genetic testing are used to achieve early diagnosis and optimize the therapeutic window.

5. Capital Investment and R&D Trends

5.1 Pharmaceutical Company Strategies

International giants: Sarepta Therapeutics (leading in exon skipping therapies), Roche (gene therapy collaborations), Italfarmaco (HDAC inhibitors), and other companies are driving the development of innovative therapies.

Chinese companies: Shufang Pharmaceuticals (valmorone launched domestically), New Sprout Gene, and Jinweike are investing in gene therapy, bringing new drugs to market through collaborative acquisitions or independent R&D.

5.2 Venture Capital and M&A

Capital Activity: In 2023-2024, several international pharmaceutical companies entered into collaborations with Chinese DMD R&D companies (e.g., Cranbury Pharmaceuticals introduced generic versions of deflazacort), promoting the development of innovative therapies such as gene therapy.

Market Forecast: China's DMD drug market is expected to continue to grow from 2024 to 2030, with innovative therapies (e.g., gene therapy) dominating the market and driving increased market penetration.

6. Technological Advances and Future Directions

6.1 Gene Therapy Breakthroughs

Elevidys' Milestone: As the first DMD gene therapy, Elevidys addresses the underlying genetic cause with a one-time treatment. Despite challenges with immunity and contraindications, it represents a future direction.

Long-Term Efficacy Verification: Confirmatory trials (e.g., the EMBARK trial) will continuously track patient functional improvements (e.g., North Star Walk Assessment, Time to Stand), verifying the durability of gene therapy.

6.2 Personalized Treatment and Digitalization

Precision Medicine: Developing personalized treatment plans based on the patient's genetic mutation type (e.g., exon skipping therapy) improves efficacy.

Digital healthcare applications: Technologies such as online diagnosis and treatment, remote monitoring (such as the "Green Channel" system at Beijing Children's Hospital) optimize patient management and enhance the medical experience.

The growth of the Duchenne muscular dystrophy (DMD) market is primarily driven by the disease burden, treatment advances (particularly gene therapy), policy support, escalating patient needs, and capital investment. In the future, with the approval of more innovative therapies and expanded medical insurance coverage, market demand will be further unleashed, and cutting-edge technologies such as gene therapy are expected to become mainstream treatments.

The global Duchenne Muscular Dystrophy market size was estimated at USD 2067.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 13.10% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Duchenne Muscular Dystrophy market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Duchenne Muscular Dystrophy market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Duchenne Muscular Dystrophy market.

Global Duchenne Muscular Dystrophy Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Sarepta Therapeutics
PTC Therapeutics
Pfizer
Bristol-Myers Squibb
Italfarmaco
Santhera Pharmaceuticals

Market Segmentation (by Type)

Exondys 51
Emflaza
Translarna

Market Segmentation (by Application)

Hospitals
Clinics
Home Care

Geographic Segmentation

North America (USA, Canada, Mexico)
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)
South America (Brazil, Argentina, Columbia, Rest of South America)
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance
Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value

In-depth analysis of the Duchenne Muscular Dystrophy Market

Overview of the regional outlook of the Duchenne Muscular Dystrophy Market:

Customization of the Report

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Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Duchenne Muscular Dystrophy Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential

of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Duchenne Muscular Dystrophy, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent

developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

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Contents

1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE

1.1 Market Definition and Statistical Scope of Duchenne Muscular Dystrophy

1.2 Key Market Segments

1.2.1 Duchenne Muscular Dystrophy Segment by Type

1.2.2 Duchenne Muscular Dystrophy Segment by Application

1.3 Methodology & Sources of Information

1.3.1 Research Methodology

1.3.2 Research Process

1.3.3 Market Breakdown and Data Triangulation

1.3.4 Base Year

1.3.5 Report Assumptions & Caveats

2 DUCHENNE MUSCULAR DYSTROPHY MARKET OVERVIEW

2.1 Global Market Overview

2.1.1 Global Duchenne Muscular Dystrophy Market Size (M USD) Estimates and Forecasts (2020-2035)

2.1.2 Global Duchenne Muscular Dystrophy Sales Estimates and Forecasts (2020-2035)

2.2 Market Segment Executive Summary

2.3 Global Market Size by Region

3 DUCHENNE MUSCULAR DYSTROPHY MARKET COMPETITIVE LANDSCAPE

3.1 Company Assessment Quadrant

3.2 Global Duchenne Muscular Dystrophy Product Life Cycle

3.3 Global Duchenne Muscular Dystrophy Sales by Manufacturers (2020-2025)

3.4 Global Duchenne Muscular Dystrophy Revenue Market Share by Manufacturers (2020-2025)

3.5 Duchenne Muscular Dystrophy Market Share by Company Type (Tier 1, Tier 2, and Tier 3)

3.6 Global Duchenne Muscular Dystrophy Average Price by Manufacturers (2020-2025)

3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types

3.8 Duchenne Muscular Dystrophy Market Competitive Situation and Trends

3.8.1 Duchenne Muscular Dystrophy Market Concentration Rate

3.8.2 Global 5 and 10 Largest Duchenne Muscular Dystrophy Players Market Share by

Revenue

3.8.3 Mergers & Acquisitions, Expansion

4 DUCHENNE MUSCULAR DYSTROPHY INDUSTRY CHAIN ANALYSIS

4.1 Duchenne Muscular Dystrophy Industry Chain Analysis

4.2 Market Overview of Key Raw Materials

4.3 Midstream Market Analysis

4.4 Downstream Customer Analysis

5 THE DEVELOPMENT AND DYNAMICS OF DUCHENNE MUSCULAR DYSTROPHY MARKET

5.1 Key Development Trends

5.2 Driving Factors

5.3 Market Challenges

5.4 Industry News

5.4.1 New Product Developments

5.4.2 Mergers & Acquisitions

5.4.3 Expansions

5.4.4 Collaboration/Supply Contracts

5.5 PEST Analysis

5.5.1 Industry Policies Analysis

5.5.2 Economic Environment Analysis

5.5.3 Social Environment Analysis

5.5.4 Technological Environment Analysis

5.6 Global Duchenne Muscular Dystrophy Market Porter's Five Forces Analysis

5.6.1 Global Trade Frictions

5.6.2 U.S. Tariff Policy ? April 2025

5.6.3 Global Trade Frictions and Their Impacts to Duchenne Muscular Dystrophy Market

5.7 ESG Ratings of Leading Companies

6 DUCHENNE MUSCULAR DYSTROPHY MARKET SEGMENTATION BY TYPE

6.1 Evaluation Matrix of Segment Market Development Potential (Type)

6.2 Global Duchenne Muscular Dystrophy Sales Market Share by Type (2020-2025)

6.3 Global Duchenne Muscular Dystrophy Market Size by Type (2020-2025)

6.4 Global Duchenne Muscular Dystrophy Price by Type (2020-2025)

7 DUCHENNE MUSCULAR DYSTROPHY MARKET SEGMENTATION BY APPLICATION

- 7.1 Evaluation Matrix of Segment Market Development Potential (Application)
- 7.2 Global Duchenne Muscular Dystrophy Market Sales by Application (2020-2025)
- 7.3 Global Duchenne Muscular Dystrophy Market Size (M USD) by Application (2020-2025)
- 7.4 Global Duchenne Muscular Dystrophy Sales Growth Rate by Application (2020-2025)

8 DUCHENNE MUSCULAR DYSTROPHY MARKET SALES BY REGION

- 8.1 Global Duchenne Muscular Dystrophy Sales by Region
 - 8.1.1 Global Duchenne Muscular Dystrophy Sales by Region
 - 8.1.2 Global Duchenne Muscular Dystrophy Sales Market Share by Region
- 8.2 Global Duchenne Muscular Dystrophy Market Size by Region
 - 8.2.1 Global Duchenne Muscular Dystrophy Market Size by Region
 - 8.2.2 Global Duchenne Muscular Dystrophy Market Size by Region
- 8.3 North America
 - 8.3.1 North America Duchenne Muscular Dystrophy Sales by Country
 - 8.3.2 North America Duchenne Muscular Dystrophy Market Size by Country
 - 8.3.3 U.S. Market Overview
 - 8.3.4 Canada Market Overview
 - 8.3.5 Mexico Market Overview
- 8.4 Europe
 - 8.4.1 Europe Duchenne Muscular Dystrophy Sales by Country
 - 8.4.2 Europe Duchenne Muscular Dystrophy Market Size by Country
 - 8.4.3 Germany Market Overview
 - 8.4.4 France Market Overview
 - 8.4.5 U.K. Market Overview
 - 8.4.6 Italy Market Overview
 - 8.4.7 Spain Market Overview
- 8.5 Asia Pacific
 - 8.5.1 Asia Pacific Duchenne Muscular Dystrophy Sales by Region
 - 8.5.2 Asia Pacific Duchenne Muscular Dystrophy Market Size by Region
 - 8.5.3 China Market Overview
 - 8.5.4 Japan Market Overview
 - 8.5.5 South Korea Market Overview

8.5.6 India Market Overview

8.5.7 Southeast Asia Market Overview

8.6 South America

8.6.1 South America Duchenne Muscular Dystrophy Sales by Country

8.6.2 South America Duchenne Muscular Dystrophy Market Size by Country

8.6.3 Brazil Market Overview

8.6.4 Argentina Market Overview

8.6.5 Columbia Market Overview

8.7 Middle East and Africa

8.7.1 Middle East and Africa Duchenne Muscular Dystrophy Sales by Region

8.7.2 Middle East and Africa Duchenne Muscular Dystrophy Market Size by Region

8.7.3 Saudi Arabia Market Overview

8.7.4 UAE Market Overview

8.7.5 Egypt Market Overview

8.7.6 Nigeria Market Overview

8.7.7 South Africa Market Overview

9 DUCHENNE MUSCULAR DYSTROPHY MARKET PRODUCTION BY REGION

9.1 Global Production of Duchenne Muscular Dystrophy by Region(2020-2025)

9.2 Global Duchenne Muscular Dystrophy Revenue Market Share by Region
(2020-2025)

9.3 Global Duchenne Muscular Dystrophy Production, Revenue, Price and Gross
Margin (2020-2025)

9.4 North America Duchenne Muscular Dystrophy Production

9.4.1 North America Duchenne Muscular Dystrophy Production Growth Rate
(2020-2025)

9.4.2 North America Duchenne Muscular Dystrophy Production, Revenue, Price and
Gross Margin (2020-2025)

9.5 Europe Duchenne Muscular Dystrophy Production

9.5.1 Europe Duchenne Muscular Dystrophy Production Growth Rate (2020-2025)

9.5.2 Europe Duchenne Muscular Dystrophy Production, Revenue, Price and Gross
Margin (2020-2025)

9.6 Japan Duchenne Muscular Dystrophy Production (2020-2025)

9.6.1 Japan Duchenne Muscular Dystrophy Production Growth Rate (2020-2025)

9.6.2 Japan Duchenne Muscular Dystrophy Production, Revenue, Price and Gross
Margin (2020-2025)

9.7 China Duchenne Muscular Dystrophy Production (2020-2025)

9.7.1 China Duchenne Muscular Dystrophy Production Growth Rate (2020-2025)

9.7.2 China Duchenne Muscular Dystrophy Production, Revenue, Price and Gross Margin (2020-2025)

10 KEY COMPANIES PROFILE

10.1 Sarepta Therapeutics

10.1.1 Sarepta Therapeutics Basic Information

10.1.2 Sarepta Therapeutics Duchenne Muscular Dystrophy Product Overview

10.1.3 Sarepta Therapeutics Duchenne Muscular Dystrophy Product Market

Performance

10.1.4 Sarepta Therapeutics Business Overview

10.1.5 Sarepta Therapeutics SWOT Analysis

10.1.6 Sarepta Therapeutics Recent Developments

10.2 PTC Therapeutics

10.2.1 PTC Therapeutics Basic Information

10.2.2 PTC Therapeutics Duchenne Muscular Dystrophy Product Overview

10.2.3 PTC Therapeutics Duchenne Muscular Dystrophy Product Market Performance

10.2.4 PTC Therapeutics Business Overview

10.2.5 PTC Therapeutics SWOT Analysis

10.2.6 PTC Therapeutics Recent Developments

10.3 Pfizer

10.3.1 Pfizer Basic Information

10.3.2 Pfizer Duchenne Muscular Dystrophy Product Overview

10.3.3 Pfizer Duchenne Muscular Dystrophy Product Market Performance

10.3.4 Pfizer Business Overview

10.3.5 Pfizer SWOT Analysis

10.3.6 Pfizer Recent Developments

10.4 Bristol-Myers Squibb

10.4.1 Bristol-Myers Squibb Basic Information

10.4.2 Bristol-Myers Squibb Duchenne Muscular Dystrophy Product Overview

10.4.3 Bristol-Myers Squibb Duchenne Muscular Dystrophy Product Market

Performance

10.4.4 Bristol-Myers Squibb Business Overview

10.4.5 Bristol-Myers Squibb Recent Developments

10.5 Italfarmaco

10.5.1 Italfarmaco Basic Information

10.5.2 Italfarmaco Duchenne Muscular Dystrophy Product Overview

10.5.3 Italfarmaco Duchenne Muscular Dystrophy Product Market Performance

10.5.4 Italfarmaco Business Overview

10.5.5 Italfarmaco Recent Developments

10.6 Santhera Pharmaceuticals

10.6.1 Santhera Pharmaceuticals Basic Information

10.6.2 Santhera Pharmaceuticals Duchenne Muscular Dystrophy Product Overview

10.6.3 Santhera Pharmaceuticals Duchenne Muscular Dystrophy Product Market Performance

10.6.4 Santhera Pharmaceuticals Business Overview

10.6.5 Santhera Pharmaceuticals Recent Developments

11 DUCHENNE MUSCULAR DYSTROPHY MARKET FORECAST BY REGION

11.1 Global Duchenne Muscular Dystrophy Market Size Forecast

11.2 Global Duchenne Muscular Dystrophy Market Forecast by Region

11.2.1 North America Market Size Forecast by Country

11.2.2 Europe Duchenne Muscular Dystrophy Market Size Forecast by Country

11.2.3 Asia Pacific Duchenne Muscular Dystrophy Market Size Forecast by Region

11.2.4 South America Duchenne Muscular Dystrophy Market Size Forecast by Country

11.2.5 Middle East and Africa Forecasted Sales of Duchenne Muscular Dystrophy by Country

12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)

12.1 Global Duchenne Muscular Dystrophy Market Forecast by Type (2026-2035)

12.1.1 Global Forecasted Sales of Duchenne Muscular Dystrophy by Type (2026-2035)

12.1.2 Global Duchenne Muscular Dystrophy Market Size Forecast by Type (2026-2035)

12.1.3 Global Forecasted Price of Duchenne Muscular Dystrophy by Type (2026-2035)

12.2 Global Duchenne Muscular Dystrophy Market Forecast by Application (2026-2035)

12.2.1 Global Duchenne Muscular Dystrophy Sales (K Units) Forecast by Application

12.2.2 Global Duchenne Muscular Dystrophy Market Size (M USD) Forecast by Application (2026-2035)

13 CONCLUSION AND KEY FINDINGS

List Of Tables

LIST OF TABLES

Table 1. Introduction of the Type

Table 2. Introduction of the Application

Table 3. Global Duchenne Muscular Dystrophy Market Size by Type (M USD)

Table 4. Global Duchenne Muscular Dystrophy Market Size by Application

Table 5. Duchenne Muscular Dystrophy Market Size Comparison by Region (M USD)

Table 6. Global Duchenne Muscular Dystrophy Sales (K Units) by Manufacturers
(2020-2025)

Table 7. Global Duchenne Muscular Dystrophy Sales Market Share by Manufacturers
(2020-2025)

Table 8. Global Duchenne Muscular Dystrophy Revenue (M USD) by Manufacturers
(2020-2025)

Table 9. Global Duchenne Muscular Dystrophy Revenue Share by Manufacturers
(2020-2025)

Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in
Duchenne Muscular Dystrophy as of 2025)

Table 11. Global Market Duchenne Muscular Dystrophy Average Price (USD/Unit) of
Key Manufacturers (2020-2025)

Table 12. Manufacturers? Manufacturing Sites, Areas Served

Table 13. Manufacturers? Product Type

Table 14. Global Duchenne Muscular Dystrophy Manufacturers Market Concentration
Ratio (CR5 and HHI)

Table 15. Mergers & Acquisitions, Expansion Plans

Table 16. Market Overview of Key Raw Materials

Table 17. Midstream Market Analysis

Table 18. Downstream Customer Analysis

Table 19. Key Development Trends

Table 20. Driving Factors

Table 21. Duchenne Muscular Dystrophy Market Challenges

Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026

Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027

Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026

Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading
Countries

Table 26. Global Duchenne Muscular Dystrophy Sales by Type (K Units)

Table 27. Global Duchenne Muscular Dystrophy Market Size by Type (M USD)

Table 28. Global Duchenne Muscular Dystrophy Sales (K Units) by Type (2020-2025)

Table 29. Global Duchenne Muscular Dystrophy Sales Market Share by Type (2020-2025)

Table 30. Global Duchenne Muscular Dystrophy Market Size (M USD) by Type (2020-2025)

Table 31. Global Duchenne Muscular Dystrophy Market Share by Type (2020-2025)

Table 32. Global Duchenne Muscular Dystrophy Price (USD/Unit) by Type (2020-2025)

Table 33. Global Duchenne Muscular Dystrophy Sales (K Units) by Application

Table 34. Global Duchenne Muscular Dystrophy Market Size by Application

Table 35. Global Duchenne Muscular Dystrophy Sales by Application (2020-2025) & (K Units)

Table 36. Global Duchenne Muscular Dystrophy Sales Market Share by Application (2020-2025)

Table 37. Global Duchenne Muscular Dystrophy Market Size by Application (2020-2025) & (M USD)

Table 38. Global Duchenne Muscular Dystrophy Market Share by Application (2020-2025)

Table 39. Global Duchenne Muscular Dystrophy Sales Growth Rate by Application (2020-2025)

Table 40. Global Duchenne Muscular Dystrophy Sales by Region (2020-2025) & (K Units)

Table 41. Global Duchenne Muscular Dystrophy Sales Market Share by Region (2020-2025)

Table 42. Global Duchenne Muscular Dystrophy Market Size by Region (2020-2025) & (M USD)

Table 43. Global Duchenne Muscular Dystrophy Market Size by Region (2020-2025)

Table 44. North America Duchenne Muscular Dystrophy Sales by Country (2020-2025) & (K Units)

Table 45. North America Duchenne Muscular Dystrophy Market Size by Country (2020-2025) & (M USD)

Table 46. Europe Duchenne Muscular Dystrophy Sales by Country (2020-2025) & (K Units)

Table 47. Europe Duchenne Muscular Dystrophy Market Size by Country (2020-2025) & (M USD)

Table 48. Asia Pacific Duchenne Muscular Dystrophy Sales by Region (2020-2025) & (K Units)

Table 49. Asia Pacific Duchenne Muscular Dystrophy Market Size by Region (2020-2025) & (M USD)

Table 50. South America Duchenne Muscular Dystrophy Sales by Country (2020-2025)

& (K Units)

Table 51. South America Duchenne Muscular Dystrophy Market Size by Country (2020-2025) & (M USD)

Table 52. Middle East and Africa Duchenne Muscular Dystrophy Sales by Region (2020-2025) & (K Units)

Table 53. Middle East and Africa Duchenne Muscular Dystrophy Market Size by Region (2020-2025) & (M USD)

Table 54. Global Duchenne Muscular Dystrophy Production (K Units) by Region(2020-2025)

Table 55. Global Duchenne Muscular Dystrophy Revenue (US\$ Million) by Region (2020-2025)

Table 56. Global Duchenne Muscular Dystrophy Revenue Market Share by Region (2020-2025)

Table 57. Global Duchenne Muscular Dystrophy Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 58. North America Duchenne Muscular Dystrophy Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 59. Europe Duchenne Muscular Dystrophy Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 60. Japan Duchenne Muscular Dystrophy Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 61. China Duchenne Muscular Dystrophy Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 62. Sarepta Therapeutics Basic Information

Table 63. Sarepta Therapeutics Duchenne Muscular Dystrophy Product Overview

Table 64. Sarepta Therapeutics Duchenne Muscular Dystrophy Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 65. Sarepta Therapeutics Business Overview

Table 66. Sarepta Therapeutics SWOT Analysis

Table 67. Sarepta Therapeutics Recent Developments

Table 68. PTC Therapeutics Basic Information

Table 69. PTC Therapeutics Duchenne Muscular Dystrophy Product Overview

Table 70. PTC Therapeutics Duchenne Muscular Dystrophy Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 71. PTC Therapeutics Business Overview

Table 72. PTC Therapeutics SWOT Analysis

Table 73. PTC Therapeutics Recent Developments

Table 74. Pfizer Basic Information

Table 75. Pfizer Duchenne Muscular Dystrophy Product Overview

Table 76. Pfizer Duchenne Muscular Dystrophy Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 77. Pfizer Business Overview

Table 78. Pfizer SWOT Analysis

Table 79. Pfizer Recent Developments

Table 80. Bristol-Myers Squibb Basic Information

Table 81. Bristol-Myers Squibb Duchenne Muscular Dystrophy Product Overview

Table 82. Bristol-Myers Squibb Duchenne Muscular Dystrophy Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 83. Bristol-Myers Squibb Business Overview

Table 84. Bristol-Myers Squibb Recent Developments

Table 85. Italfarmaco Basic Information

Table 86. Italfarmaco Duchenne Muscular Dystrophy Product Overview

Table 87. Italfarmaco Duchenne Muscular Dystrophy Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 88. Italfarmaco Business Overview

Table 89. Italfarmaco Recent Developments

Table 90. Santhera Pharmaceuticals Basic Information

Table 91. Santhera Pharmaceuticals Duchenne Muscular Dystrophy Product Overview

Table 92. Santhera Pharmaceuticals Duchenne Muscular Dystrophy Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 93. Santhera Pharmaceuticals Business Overview

Table 94. Santhera Pharmaceuticals Recent Developments

Table 95. Global Duchenne Muscular Dystrophy Sales Forecast by Region (2026-2035) & (K Units)

Table 96. Global Duchenne Muscular Dystrophy Market Size Forecast by Region (2026-2035) & (M USD)

Table 97. North America Duchenne Muscular Dystrophy Sales Forecast by Country (2026-2035) & (K Units)

Table 98. North America Duchenne Muscular Dystrophy Market Size Forecast by Country (2026-2035) & (M USD)

Table 99. Europe Duchenne Muscular Dystrophy Sales Forecast by Country (2026-2035) & (K Units)

Table 100. Europe Duchenne Muscular Dystrophy Market Size Forecast by Country (2026-2035) & (M USD)

Table 101. Asia Pacific Duchenne Muscular Dystrophy Sales Forecast by Region (2026-2035) & (K Units)

Table 102. Asia Pacific Duchenne Muscular Dystrophy Market Size Forecast by Region (2026-2035) & (M USD)

Table 103. South America Duchenne Muscular Dystrophy Sales Forecast by Country (2026-2035) & (K Units)

Table 104. South America Duchenne Muscular Dystrophy Market Size Forecast by Country (2026-2035) & (M USD)

Table 105. Middle East and Africa Duchenne Muscular Dystrophy Sales Forecast by Country (2026-2035) & (Units)

Table 106. Middle East and Africa Duchenne Muscular Dystrophy Market Size Forecast by Country (2026-2035) & (M USD)

Table 107. Global Duchenne Muscular Dystrophy Sales Forecast by Type (2026-2035) & (K Units)

Table 108. Global Duchenne Muscular Dystrophy Market Size Forecast by Type (2026-2035) & (M USD)

Table 109. Global Duchenne Muscular Dystrophy Price Forecast by Type (2026-2035) & (USD/Unit)

Table 110. Global Duchenne Muscular Dystrophy Sales (K Units) Forecast by Application (2026-2035)

Table 111. Global Duchenne Muscular Dystrophy Market Size Forecast by Application (2026-2035) & (M USD)

List Of Figures

LIST OF FIGURES

- Figure 1. Product Picture of Duchenne Muscular Dystrophy
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Duchenne Muscular Dystrophy Market Size (M USD), 2025-2035
- Figure 5. Global Duchenne Muscular Dystrophy Market Size (M USD) (2020-2035)
- Figure 6. Global Duchenne Muscular Dystrophy Sales (K Units) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. Duchenne Muscular Dystrophy Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global Duchenne Muscular Dystrophy Product Life Cycle
- Figure 13. Duchenne Muscular Dystrophy Sales Share by Manufacturers in 2025
- Figure 14. Global Duchenne Muscular Dystrophy Revenue Share by Manufacturers in 2025
- Figure 15. Duchenne Muscular Dystrophy Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market Duchenne Muscular Dystrophy Average Price (USD/Unit) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by Duchenne Muscular Dystrophy Revenue in 2025
- Figure 18. Industry Chain Map of Duchenne Muscular Dystrophy
- Figure 19. Global Duchenne Muscular Dystrophy Market PEST Analysis
- Figure 20. Global Duchenne Muscular Dystrophy Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 26. Global Duchenne Muscular Dystrophy Market Share by Type
- Figure 27. Sales Market Share of Duchenne Muscular Dystrophy by Type (2020-2025)
- Figure 28. Sales Market Share of Duchenne Muscular Dystrophy by Type in 2025
- Figure 29. Market Share of Duchenne Muscular Dystrophy by Type (2020-2025)
- Figure 30. Market Share of Duchenne Muscular Dystrophy by Type in 2025
- Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)

Figure 32. Global Duchenne Muscular Dystrophy Market Share by Application

Figure 33. Global Duchenne Muscular Dystrophy Sales Market Share by Application (2020-2025)

Figure 34. Global Duchenne Muscular Dystrophy Sales Market Share by Application in 2025

Figure 35. Global Duchenne Muscular Dystrophy Market Share by Application (2020-2025)

Figure 36. Global Duchenne Muscular Dystrophy Market Share by Application in 2025

Figure 37. Global Duchenne Muscular Dystrophy Sales Growth Rate by Application (2020-2025)

Figure 38. Global Duchenne Muscular Dystrophy Sales Market Share by Region (2020-2025)

Figure 39. Global Duchenne Muscular Dystrophy Market Size by Region (2020-2025)

Figure 40. North America Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 41. North America Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 42. North America Duchenne Muscular Dystrophy Sales Market Share by Country in 2024

Figure 43. North America Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 44. North America Duchenne Muscular Dystrophy Market Size by Country in 2024

Figure 45. U.S. Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 46. U.S. Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 47. Canada Duchenne Muscular Dystrophy Sales (K Units) and Growth Rate (2020-2025)

Figure 48. Canada Duchenne Muscular Dystrophy Market Size (M USD) and Growth Rate (2020-2025)

Figure 49. Mexico Duchenne Muscular Dystrophy Sales (Units) and Growth Rate (2020-2025)

Figure 50. Mexico Duchenne Muscular Dystrophy Market Size (Units) and Growth Rate (2020-2025)

Figure 51. Europe Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 52. Europe Duchenne Muscular Dystrophy Sales Market Share by Country in 2024

Figure 53. Europe Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe Duchenne Muscular Dystrophy Market Size by Country in 2024

Figure 55. Germany Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 56. Germany Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 58. France Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 60. U.K. Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 62. Italy Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 64. Spain Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific Duchenne Muscular Dystrophy Sales and Growth Rate (K Units)

Figure 66. Asia Pacific Duchenne Muscular Dystrophy Sales Market Share by Region in 2024

Figure 67. Asia Pacific Duchenne Muscular Dystrophy Market Size by Region in 2024

Figure 68. China Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 69. China Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 71. Japan Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 73. South Korea Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 75. India Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 76. Southeast Asia Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 77. Southeast Asia Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 78. South America Duchenne Muscular Dystrophy Sales and Growth Rate (K Units)

Figure 79. South America Duchenne Muscular Dystrophy Sales Market Share by Country in 2024

Figure 80. South America Duchenne Muscular Dystrophy Market Size and Growth Rate (M USD)

Figure 81. South America Duchenne Muscular Dystrophy Market Size by Country in 2024

Figure 82. Brazil Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 83. Brazil Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 84. Argentina Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 85. Argentina Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 86. Columbia Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 87. Columbia Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 88. Middle East and Africa Duchenne Muscular Dystrophy Sales and Growth Rate (K Units)

Figure 89. Middle East and Africa Duchenne Muscular Dystrophy Sales Market Share by Region in 2024

Figure 90. Middle East and Africa Duchenne Muscular Dystrophy Market Size and Growth Rate (M USD)

Figure 91. Middle East and Africa Duchenne Muscular Dystrophy Market Size by Region in 2024

Figure 92. Saudi Arabia Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 93. Saudi Arabia Duchenne Muscular Dystrophy Market Size and Growth Rate

(2020-2025) & (M USD)

Figure 94. UAE Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 95. UAE Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 97. Egypt Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 99. Nigeria Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa Duchenne Muscular Dystrophy Sales and Growth Rate (2020-2025) & (K Units)

Figure 101. South Africa Duchenne Muscular Dystrophy Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global Duchenne Muscular Dystrophy Production Market Share by Region (2020-2025)

Figure 103. North America Duchenne Muscular Dystrophy Production (K Units) Growth Rate (2020-2025)

Figure 104. Europe Duchenne Muscular Dystrophy Production (K Units) Growth Rate (2020-2025)

Figure 105. Japan Duchenne Muscular Dystrophy Production (K Units) Growth Rate (2020-2025)

Figure 106. China Duchenne Muscular Dystrophy Production (K Units) Growth Rate (2020-2025)

Figure 107. Global Duchenne Muscular Dystrophy Sales Forecast by Volume (2020-2035) & (K Units)

Figure 108. Global Duchenne Muscular Dystrophy Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global Duchenne Muscular Dystrophy Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global Duchenne Muscular Dystrophy Market Share Forecast by Type (2026-2035)

Figure 111. Global Duchenne Muscular Dystrophy Sales Forecast by Application (2026-2035)

Figure 112. Global Duchenne Muscular Dystrophy Market Share Forecast by Application (2026-2035)

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