

Global Non-benzodiazepine Hypnotics Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Non-benzodiazepine Hypnotics market size is expected to reach \$ 1479 million by 2032, rising at a market growth of 2.8% CAGR during the forecast period (2026-2032).

Non-benzodiazepine hypnotics are prescription Z-drugs, primarily including zolpidem, zopiclone, eszopiclone, and zaleplon. Although chemically distinct from conventional benzodiazepines, they mainly produce sedative and hypnotic effects by modulating the GABA_A receptor complex and are used to treat difficulty initiating sleep, frequent nocturnal awakening, early awakening, and sleep-maintenance insomnia. Major dosage forms include immediate-release tablets, extended-release tablets, sublingual tablets, orally disintegrating tablets, capsules, and oral sprays. Upstream inputs mainly include zolpidem tartrate, zopiclone, eszopiclone, and zaleplon active pharmaceutical ingredients, together with pharmaceutical excipients, coating materials, capsule shells, blister packaging, and other pharmaceutical packaging materials. Downstream customers mainly include hospitals, psychiatric and sleep clinics, retail pharmacies, pharmaceutical wholesalers, and regulated online prescription platforms. Generic competition is relatively intense, while differentiated dosage forms and branded products retain higher added value, with an overall gross margin generally ranging from approximately 45% to 68%.

From the current market perspective, non-benzodiazepine hypnotics have developed into a mature market dominated by zolpidem, with zopiclone and eszopiclone representing important secondary segments and zaleplon accounting for a relatively small share. All major active ingredients are exposed to generic competition, and standard tablets are supplied by numerous manufacturers. Regional structures differ: the United States relies mainly on zolpidem and eszopiclone, zopiclone is more widely

used in Europe, Canada, and parts of Asia, and China uses zolpidem, zopiclone, and eszopiclone under controlled-drug manufacturing, distribution, and prescribing requirements.

Looking ahead, market development will focus increasingly on dosage-form optimization, lower-dose treatment, individualized dosing, and medication safety. Standard tablets will continue to account for most volume, while extended-release tablets, sublingual products, oral sprays, and low-dose products for middle-of-the-night awakening offer greater differentiation. Manufacturers will strengthen risk management relating to next-day impairment, complex sleep behaviors, falls in older patients, and dependence, while improving prescription review, packaging controls, and patient education.

Key market drivers include faster-paced lifestyles, psychological stress, population aging, psychiatric comorbidities, and improving recognition of sleep disorders. Z-drugs have long-established clinical use, rapid onset, broad physician familiarity, and lower treatment costs than many newer insomnia medicines. These characteristics support continued use in primary care, hospital, and retail prescription markets. Wider generic availability also improves affordability and market access in lower- and middle-income countries.

The main constraints include risks of tolerance, dependence, misuse, withdrawal, next-day cognitive and motor impairment, and complex sleep behaviors. Many countries impose controlled-drug rules and limits on prescription duration. Cognitive behavioral therapy for insomnia, digital sleep interventions, orexin receptor antagonists, and other new-mechanism treatments will divert some chronic-insomnia patients. In addition, centralized procurement, reimbursement controls, and generic competition will continue to reduce average selling prices, limiting revenue growth despite increasing treatment volume.

This report studies the global Non-benzodiazepine Hypnotics demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Non-benzodiazepine Hypnotics, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Non-benzodiazepine Hypnotics that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Non-benzodiazepine Hypnotics total market, 2021-2032, (USD Million)

Global Non-benzodiazepine Hypnotics total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Non-benzodiazepine Hypnotics total market, key domestic companies, and share, (USD Million)

Global Non-benzodiazepine Hypnotics revenue by player, revenue and market share 2021-2026, (USD Million)

Global Non-benzodiazepine Hypnotics total market by Type, CAGR, 2021-2032, (USD Million)

Global Non-benzodiazepine Hypnotics total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Non-benzodiazepine Hypnotics market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Cosette Pharmaceuticals, Sanofi, Sumitomo Pharma, Teva Pharmaceutical Industries, Viatris, Sandoz, Aurobindo Pharma, Sun Pharmaceutical Industries, Dr. Reddy's Laboratories, Torrent Pharmaceuticals, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Non-benzodiazepine Hypnotics market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Non-benzodiazepine Hypnotics Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Non-benzodiazepine Hypnotics Market, Segmentation by Type:

Zolpidem

Zopiclone

Eszopiclone

Zaleplon

Global Non-benzodiazepine Hypnotics Market, Segmentation by Dosage Form:

Tablets

Capsules

Other

Global Non-benzodiazepine Hypnotics Market, Segmentation by Product Status:

Originator Drugs

Generic Drugs

Global Non-benzodiazepine Hypnotics Market, Segmentation by Application:

Hospitals

Clinics

Other

Companies Profiled:

Cosette Pharmaceuticals

Sanofi

Sumitomo Pharma

Teva Pharmaceutical Industries

Viatis

Sandoz

Aurobindo Pharma

Sun Pharmaceutical Industries

Dr. Reddy's Laboratories

Torrent Pharmaceuticals

Lupin

Jiangsu Nhwa Pharmaceutical

Shanghai Pharmaceuticals

Qilu Pharmaceutical

Chengdu Kanghong Pharmaceutical Group

Key Questions Answered

1. How big is the global Non-benzodiazepine Hypnotics market?
2. What is the demand of the global Non-benzodiazepine Hypnotics market?
3. What is the year over year growth of the global Non-benzodiazepine Hypnotics market?
4. What is the total value of the global Non-benzodiazepine Hypnotics market?
5. Who are the Major Players in the global Non-benzodiazepine Hypnotics market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Non-benzodiazepine Hypnotics Introduction
- 1.2 World Non-benzodiazepine Hypnotics Market Size & Forecast (2021 & 2025 & 2032)
- 1.3 World Non-benzodiazepine Hypnotics Total Market by Region (by Headquarter Location)
 - 1.3.1 World Non-benzodiazepine Hypnotics Market Size by Region (2021-2032), (by Headquarter Location)
 - 1.3.2 United States Based Company Non-benzodiazepine Hypnotics Revenue (2021-2032)
 - 1.3.3 China Based Company Non-benzodiazepine Hypnotics Revenue (2021-2032)
 - 1.3.4 Europe Based Company Non-benzodiazepine Hypnotics Revenue (2021-2032)
 - 1.3.5 Japan Based Company Non-benzodiazepine Hypnotics Revenue (2021-2032)
 - 1.3.6 South Korea Based Company Non-benzodiazepine Hypnotics Revenue (2021-2032)
 - 1.3.7 ASEAN Based Company Non-benzodiazepine Hypnotics Revenue (2021-2032)
 - 1.3.8 India Based Company Non-benzodiazepine Hypnotics Revenue (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Non-benzodiazepine Hypnotics Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Non-benzodiazepine Hypnotics Consumption Value (2021-2032)
- 2.2 World Non-benzodiazepine Hypnotics Consumption Value by Region
 - 2.2.1 World Non-benzodiazepine Hypnotics Consumption Value by Region (2021-2026)
 - 2.2.2 World Non-benzodiazepine Hypnotics Consumption Value Forecast by Region (2027-2032)
- 2.3 United States Non-benzodiazepine Hypnotics Consumption Value (2021-2032)
- 2.4 China Non-benzodiazepine Hypnotics Consumption Value (2021-2032)
- 2.5 Europe Non-benzodiazepine Hypnotics Consumption Value (2021-2032)
- 2.6 Japan Non-benzodiazepine Hypnotics Consumption Value (2021-2032)
- 2.7 South Korea Non-benzodiazepine Hypnotics Consumption Value (2021-2032)
- 2.8 ASEAN Non-benzodiazepine Hypnotics Consumption Value (2021-2032)

2.9 India Non-benzodiazepine Hypnotics Consumption Value (2021-2032)

3 WORLD NON-BENZODIAZEPINE HYPNOTICS COMPANIES COMPETITIVE ANALYSIS

3.1 World Non-benzodiazepine Hypnotics Revenue by Player (2021-2026)

3.2 Industry Rank and Concentration Rate (CR)

3.2.1 Global Non-benzodiazepine Hypnotics Industry Rank of Major Players

3.2.2 Global Concentration Ratios (CR4) for Non-benzodiazepine Hypnotics in 2025

3.2.3 Global Concentration Ratios (CR8) for Non-benzodiazepine Hypnotics in 2025

3.3 Non-benzodiazepine Hypnotics Company Evaluation Quadrant

3.4 Non-benzodiazepine Hypnotics Market: Overall Company Footprint Analysis

3.4.1 Non-benzodiazepine Hypnotics Market: Region Footprint

3.4.2 Non-benzodiazepine Hypnotics Market: Company Product Type Footprint

3.4.3 Non-benzodiazepine Hypnotics Market: Company Product Application Footprint

3.5 Competitive Environment

3.5.1 Historical Structure of the Industry

3.5.2 Barriers of Market Entry

3.5.3 Factors of Competition

3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: Non-benzodiazepine Hypnotics Revenue Comparison (by Headquarter Location)

4.1.1 United States VS China: Non-benzodiazepine Hypnotics Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)

4.1.2 United States VS China: Non-benzodiazepine Hypnotics Revenue Market Share Comparison (2021 & 2025 & 2032)

4.2 United States Based Companies VS China Based Companies: Non-benzodiazepine Hypnotics Consumption Value Comparison

4.2.1 United States VS China: Non-benzodiazepine Hypnotics Consumption Value Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Non-benzodiazepine Hypnotics Consumption Value Market Share Comparison (2021 & 2025 & 2032)

4.3 United States Based Non-benzodiazepine Hypnotics Companies and Market Share, 2021-2026

4.3.1 United States Based Non-benzodiazepine Hypnotics Companies, Headquarters

(States, Country)

4.3.2 United States Based Companies Non-benzodiazepine Hypnotics Revenue, (2021-2026)

4.4 China Based Companies Non-benzodiazepine Hypnotics Revenue and Market Share, 2021-2026

4.4.1 China Based Non-benzodiazepine Hypnotics Companies, Company Headquarters (Province, Country)

4.4.2 China Based Companies Non-benzodiazepine Hypnotics Revenue, (2021-2026)

4.5 Rest of World Based Non-benzodiazepine Hypnotics Companies and Market Share, 2021-2026

4.5.1 Rest of World Based Non-benzodiazepine Hypnotics Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies Non-benzodiazepine Hypnotics Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Non-benzodiazepine Hypnotics Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Zolpidem

5.2.2 Zopiclone

5.2.3 Eszopiclone

5.2.4 Zaleplon

5.3 Market Segment by Type

5.3.1 World Non-benzodiazepine Hypnotics Market Size by Type (2021-2026)

5.3.2 World Non-benzodiazepine Hypnotics Market Size by Type (2027-2032)

5.3.3 World Non-benzodiazepine Hypnotics Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY DOSAGE FORM

6.1 World Non-benzodiazepine Hypnotics Market Size Overview by Dosage Form: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Dosage Form

6.2.1 Tablets

6.2.2 Capsules

6.2.3 Other

6.3 Market Segment by Dosage Form

- 6.3.1 World Non-benzodiazepine Hypnotics Market Size by Dosage Form (2021-2026)
- 6.3.2 World Non-benzodiazepine Hypnotics Market Size by Dosage Form (2027-2032)
- 6.3.3 World Non-benzodiazepine Hypnotics Market Size Market Share by Dosage Form (2027-2032)

7 MARKET ANALYSIS BY PRODUCT STATUS

- 7.1 World Non-benzodiazepine Hypnotics Market Size Overview by Product Status: 2021 VS 2025 VS 2032
- 7.2 Segment Introduction by Product Status
 - 7.2.1 Originator Drugs
 - 7.2.2 Generic Drugs
- 7.3 Market Segment by Product Status
 - 7.3.1 World Non-benzodiazepine Hypnotics Market Size by Product Status (2021-2026)
 - 7.3.2 World Non-benzodiazepine Hypnotics Market Size by Product Status (2027-2032)
 - 7.3.3 World Non-benzodiazepine Hypnotics Market Size Market Share by Product Status (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

- 8.1 World Non-benzodiazepine Hypnotics Market Size Overview by Application: 2021 VS 2025 VS 2032
- 8.2 Segment Introduction by Application
 - 8.2.1 Hospitals
 - 8.2.2 Clinics
 - 8.2.3 Other
- 8.3 Market Segment by Application
 - 8.3.1 World Non-benzodiazepine Hypnotics Market Size by Application (2021-2026)
 - 8.3.2 World Non-benzodiazepine Hypnotics Market Size by Application (2027-2032)
 - 8.3.3 World Non-benzodiazepine Hypnotics Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

- 9.1 Cosette Pharmaceuticals
 - 9.1.1 Cosette Pharmaceuticals Details
 - 9.1.2 Cosette Pharmaceuticals Major Business

- 9.1.3 Cosette Pharmaceuticals Non-benzodiazepine Hypnotics Product and Services
- 9.1.4 Cosette Pharmaceuticals Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026)
- 9.1.5 Cosette Pharmaceuticals Recent Developments/Updates
- 9.1.6 Cosette Pharmaceuticals Competitive Strengths & Weaknesses
- 9.2 Sanofi
 - 9.2.1 Sanofi Details
 - 9.2.2 Sanofi Major Business
 - 9.2.3 Sanofi Non-benzodiazepine Hypnotics Product and Services
 - 9.2.4 Sanofi Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026)
 - 9.2.5 Sanofi Recent Developments/Updates
 - 9.2.6 Sanofi Competitive Strengths & Weaknesses
- 9.3 Sumitomo Pharma
 - 9.3.1 Sumitomo Pharma Details
 - 9.3.2 Sumitomo Pharma Major Business
 - 9.3.3 Sumitomo Pharma Non-benzodiazepine Hypnotics Product and Services
 - 9.3.4 Sumitomo Pharma Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Sumitomo Pharma Recent Developments/Updates
 - 9.3.6 Sumitomo Pharma Competitive Strengths & Weaknesses
- 9.4 Teva Pharmaceutical Industries
 - 9.4.1 Teva Pharmaceutical Industries Details
 - 9.4.2 Teva Pharmaceutical Industries Major Business
 - 9.4.3 Teva Pharmaceutical Industries Non-benzodiazepine Hypnotics Product and Services
 - 9.4.4 Teva Pharmaceutical Industries Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Teva Pharmaceutical Industries Recent Developments/Updates
 - 9.4.6 Teva Pharmaceutical Industries Competitive Strengths & Weaknesses
- 9.5 Viatris
 - 9.5.1 Viatris Details
 - 9.5.2 Viatris Major Business
 - 9.5.3 Viatris Non-benzodiazepine Hypnotics Product and Services
 - 9.5.4 Viatris Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Viatris Recent Developments/Updates
 - 9.5.6 Viatris Competitive Strengths & Weaknesses
- 9.6 Sandoz

- 9.6.1 Sandoz Details
- 9.6.2 Sandoz Major Business
- 9.6.3 Sandoz Non-benzodiazepine Hypnotics Product and Services
- 9.6.4 Sandoz Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026)
- 9.6.5 Sandoz Recent Developments/Updates
- 9.6.6 Sandoz Competitive Strengths & Weaknesses
- 9.7 Aurobindo Pharma
 - 9.7.1 Aurobindo Pharma Details
 - 9.7.2 Aurobindo Pharma Major Business
 - 9.7.3 Aurobindo Pharma Non-benzodiazepine Hypnotics Product and Services
 - 9.7.4 Aurobindo Pharma Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026)
 - 9.7.5 Aurobindo Pharma Recent Developments/Updates
 - 9.7.6 Aurobindo Pharma Competitive Strengths & Weaknesses
- 9.8 Sun Pharmaceutical Industries
 - 9.8.1 Sun Pharmaceutical Industries Details
 - 9.8.2 Sun Pharmaceutical Industries Major Business
 - 9.8.3 Sun Pharmaceutical Industries Non-benzodiazepine Hypnotics Product and Services
 - 9.8.4 Sun Pharmaceutical Industries Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Sun Pharmaceutical Industries Recent Developments/Updates
 - 9.8.6 Sun Pharmaceutical Industries Competitive Strengths & Weaknesses
- 9.9 Dr. Reddy's Laboratories
 - 9.9.1 Dr. Reddy's Laboratories Details
 - 9.9.2 Dr. Reddy's Laboratories Major Business
 - 9.9.3 Dr. Reddy's Laboratories Non-benzodiazepine Hypnotics Product and Services
 - 9.9.4 Dr. Reddy's Laboratories Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026)
 - 9.9.5 Dr. Reddy's Laboratories Recent Developments/Updates
 - 9.9.6 Dr. Reddy's Laboratories Competitive Strengths & Weaknesses
- 9.10 Torrent Pharmaceuticals
 - 9.10.1 Torrent Pharmaceuticals Details
 - 9.10.2 Torrent Pharmaceuticals Major Business
 - 9.10.3 Torrent Pharmaceuticals Non-benzodiazepine Hypnotics Product and Services
 - 9.10.4 Torrent Pharmaceuticals Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Torrent Pharmaceuticals Recent Developments/Updates

- 9.10.6 Torrent Pharmaceuticals Competitive Strengths & Weaknesses
- 9.11 Lupin
 - 9.11.1 Lupin Details
 - 9.11.2 Lupin Major Business
 - 9.11.3 Lupin Non-benzodiazepine Hypnotics Product and Services
 - 9.11.4 Lupin Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Lupin Recent Developments/Updates
 - 9.11.6 Lupin Competitive Strengths & Weaknesses
- 9.12 Jiangsu Nhwa Pharmaceutical
 - 9.12.1 Jiangsu Nhwa Pharmaceutical Details
 - 9.12.2 Jiangsu Nhwa Pharmaceutical Major Business
 - 9.12.3 Jiangsu Nhwa Pharmaceutical Non-benzodiazepine Hypnotics Product and Services
 - 9.12.4 Jiangsu Nhwa Pharmaceutical Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Jiangsu Nhwa Pharmaceutical Recent Developments/Updates
 - 9.12.6 Jiangsu Nhwa Pharmaceutical Competitive Strengths & Weaknesses
- 9.13 Shanghai Pharmaceuticals
 - 9.13.1 Shanghai Pharmaceuticals Details
 - 9.13.2 Shanghai Pharmaceuticals Major Business
 - 9.13.3 Shanghai Pharmaceuticals Non-benzodiazepine Hypnotics Product and Services
 - 9.13.4 Shanghai Pharmaceuticals Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Shanghai Pharmaceuticals Recent Developments/Updates
 - 9.13.6 Shanghai Pharmaceuticals Competitive Strengths & Weaknesses
- 9.14 Qilu Pharmaceutical
 - 9.14.1 Qilu Pharmaceutical Details
 - 9.14.2 Qilu Pharmaceutical Major Business
 - 9.14.3 Qilu Pharmaceutical Non-benzodiazepine Hypnotics Product and Services
 - 9.14.4 Qilu Pharmaceutical Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Qilu Pharmaceutical Recent Developments/Updates
 - 9.14.6 Qilu Pharmaceutical Competitive Strengths & Weaknesses
- 9.15 Chengdu Kanghong Pharmaceutical Group
 - 9.15.1 Chengdu Kanghong Pharmaceutical Group Details
 - 9.15.2 Chengdu Kanghong Pharmaceutical Group Major Business
 - 9.15.3 Chengdu Kanghong Pharmaceutical Group Non-benzodiazepine Hypnotics

Product and Services

9.15.4 Chengdu Kanghong Pharmaceutical Group Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026)

9.15.5 Chengdu Kanghong Pharmaceutical Group Recent Developments/Updates

9.15.6 Chengdu Kanghong Pharmaceutical Group Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Non-benzodiazepine Hypnotics Industry Chain

10.2 Non-benzodiazepine Hypnotics Upstream Analysis

10.3 Non-benzodiazepine Hypnotics Midstream Analysis

10.4 Non-benzodiazepine Hypnotics Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Non-benzodiazepine Hypnotics Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Table 2. World Non-benzodiazepine Hypnotics Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)

Table 3. World Non-benzodiazepine Hypnotics Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)

Table 4. World Non-benzodiazepine Hypnotics Revenue Market Share by Region (2021-2026), (by Headquarter Location)

Table 5. World Non-benzodiazepine Hypnotics Revenue Market Share by Region (2027-2032), (by Headquarter Location)

Table 6. Major Market Trends

Table 7. World Non-benzodiazepine Hypnotics Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)

Table 8. World Non-benzodiazepine Hypnotics Consumption Value by Region (2021-2026) & (USD Million)

Table 9. World Non-benzodiazepine Hypnotics Consumption Value Forecast by Region (2027-2032) & (USD Million)

Table 10. World Non-benzodiazepine Hypnotics Revenue by Player (2021-2026) & (USD Million)

Table 11. Revenue Market Share of Key Non-benzodiazepine Hypnotics Players in 2025

Table 12. World Non-benzodiazepine Hypnotics Industry Rank of Major Player, Based on Revenue in 2025

Table 13. Global Non-benzodiazepine Hypnotics Company Evaluation Quadrant

Table 14. Head Office of Key Non-benzodiazepine Hypnotics Players

Table 15. Non-benzodiazepine Hypnotics Market: Company Product Type Footprint

Table 16. Non-benzodiazepine Hypnotics Market: Company Product Application Footprint

Table 17. Non-benzodiazepine Hypnotics Mergers & Acquisitions Activity

Table 18. United States VS China Non-benzodiazepine Hypnotics Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 19. United States VS China Non-benzodiazepine Hypnotics Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 20. United States Based Non-benzodiazepine Hypnotics Companies, Headquarters (States, Country)

Table 21. United States Based Companies Non-benzodiazepine Hypnotics Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies Non-benzodiazepine Hypnotics Revenue Market Share (2021-2026)

Table 23. China Based Non-benzodiazepine Hypnotics Companies, Headquarters (Province, Country)

Table 24. China Based Companies Non-benzodiazepine Hypnotics Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies Non-benzodiazepine Hypnotics Revenue Market Share (2021-2026)

Table 26. Rest of World Based Non-benzodiazepine Hypnotics Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies Non-benzodiazepine Hypnotics Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies Non-benzodiazepine Hypnotics Revenue Market Share (2021-2026)

Table 29. World Non-benzodiazepine Hypnotics Market Size by Type, (USD Million), 2021 & 2025 & 2032

Table 30. World Non-benzodiazepine Hypnotics Market Size Value by Type (2021-2026) & (USD Million)

Table 31. World Non-benzodiazepine Hypnotics Market Size by Type (2027-2032) & (USD Million)

Table 32. World Non-benzodiazepine Hypnotics Market Size by Dosage Form, (USD Million), 2021 & 2025 & 2032

Table 33. World Non-benzodiazepine Hypnotics Market Size Value by Dosage Form (2021-2026) & (USD Million)

Table 34. World Non-benzodiazepine Hypnotics Market Size by Dosage Form (2027-2032) & (USD Million)

Table 35. World Non-benzodiazepine Hypnotics Market Size by Product Status, (USD Million), 2021 & 2025 & 2032

Table 36. World Non-benzodiazepine Hypnotics Market Size Value by Product Status (2021-2026) & (USD Million)

Table 37. World Non-benzodiazepine Hypnotics Market Size by Product Status (2027-2032) & (USD Million)

Table 38. World Non-benzodiazepine Hypnotics Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 39. World Non-benzodiazepine Hypnotics Market Size by Application (2021-2026) & (USD Million)

Table 40. World Non-benzodiazepine Hypnotics Market Size by Application (2027-2032)

& (USD Million)

Table 41. Cosette Pharmaceuticals Basic Information, Manufacturing Base and Competitors

Table 42. Cosette Pharmaceuticals Major Business

Table 43. Cosette Pharmaceuticals Non-benzodiazepine Hypnotics Product and Services

Table 44. Cosette Pharmaceuticals Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 45. Cosette Pharmaceuticals Recent Developments/Updates

Table 46. Cosette Pharmaceuticals Competitive Strengths & Weaknesses

Table 47. Sanofi Basic Information, Manufacturing Base and Competitors

Table 48. Sanofi Major Business

Table 49. Sanofi Non-benzodiazepine Hypnotics Product and Services

Table 50. Sanofi Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 51. Sanofi Recent Developments/Updates

Table 52. Sanofi Competitive Strengths & Weaknesses

Table 53. Sumitomo Pharma Basic Information, Manufacturing Base and Competitors

Table 54. Sumitomo Pharma Major Business

Table 55. Sumitomo Pharma Non-benzodiazepine Hypnotics Product and Services

Table 56. Sumitomo Pharma Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 57. Sumitomo Pharma Recent Developments/Updates

Table 58. Sumitomo Pharma Competitive Strengths & Weaknesses

Table 59. Teva Pharmaceutical Industries Basic Information, Manufacturing Base and Competitors

Table 60. Teva Pharmaceutical Industries Major Business

Table 61. Teva Pharmaceutical Industries Non-benzodiazepine Hypnotics Product and Services

Table 62. Teva Pharmaceutical Industries Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 63. Teva Pharmaceutical Industries Recent Developments/Updates

Table 64. Teva Pharmaceutical Industries Competitive Strengths & Weaknesses

Table 65. Viartis Basic Information, Manufacturing Base and Competitors

Table 66. Viartis Major Business

Table 67. Viartis Non-benzodiazepine Hypnotics Product and Services

Table 68. Viartis Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 69. Viartis Recent Developments/Updates

Table 70. Viatris Competitive Strengths & Weaknesses
Table 71. Sandoz Basic Information, Manufacturing Base and Competitors
Table 72. Sandoz Major Business
Table 73. Sandoz Non-benzodiazepine Hypnotics Product and Services
Table 74. Sandoz Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 75. Sandoz Recent Developments/Updates
Table 76. Sandoz Competitive Strengths & Weaknesses
Table 77. Aurobindo Pharma Basic Information, Manufacturing Base and Competitors
Table 78. Aurobindo Pharma Major Business
Table 79. Aurobindo Pharma Non-benzodiazepine Hypnotics Product and Services
Table 80. Aurobindo Pharma Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 81. Aurobindo Pharma Recent Developments/Updates
Table 82. Aurobindo Pharma Competitive Strengths & Weaknesses
Table 83. Sun Pharmaceutical Industries Basic Information, Manufacturing Base and Competitors
Table 84. Sun Pharmaceutical Industries Major Business
Table 85. Sun Pharmaceutical Industries Non-benzodiazepine Hypnotics Product and Services
Table 86. Sun Pharmaceutical Industries Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 87. Sun Pharmaceutical Industries Recent Developments/Updates
Table 88. Sun Pharmaceutical Industries Competitive Strengths & Weaknesses
Table 89. Dr. Reddy's Laboratories Basic Information, Manufacturing Base and Competitors
Table 90. Dr. Reddy's Laboratories Major Business
Table 91. Dr. Reddy's Laboratories Non-benzodiazepine Hypnotics Product and Services
Table 92. Dr. Reddy's Laboratories Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 93. Dr. Reddy's Laboratories Recent Developments/Updates
Table 94. Dr. Reddy's Laboratories Competitive Strengths & Weaknesses
Table 95. Torrent Pharmaceuticals Basic Information, Manufacturing Base and Competitors
Table 96. Torrent Pharmaceuticals Major Business
Table 97. Torrent Pharmaceuticals Non-benzodiazepine Hypnotics Product and Services
Table 98. Torrent Pharmaceuticals Non-benzodiazepine Hypnotics Revenue, Gross

Margin and Market Share (2021-2026) & (USD Million)

Table 99. Torrent Pharmaceuticals Recent Developments/Updates

Table 100. Torrent Pharmaceuticals Competitive Strengths & Weaknesses

Table 101. Lupin Basic Information, Manufacturing Base and Competitors

Table 102. Lupin Major Business

Table 103. Lupin Non-benzodiazepine Hypnotics Product and Services

Table 104. Lupin Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 105. Lupin Recent Developments/Updates

Table 106. Lupin Competitive Strengths & Weaknesses

Table 107. Jiangsu Nhwa Pharmaceutical Basic Information, Manufacturing Base and Competitors

Table 108. Jiangsu Nhwa Pharmaceutical Major Business

Table 109. Jiangsu Nhwa Pharmaceutical Non-benzodiazepine Hypnotics Product and Services

Table 110. Jiangsu Nhwa Pharmaceutical Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 111. Jiangsu Nhwa Pharmaceutical Recent Developments/Updates

Table 112. Jiangsu Nhwa Pharmaceutical Competitive Strengths & Weaknesses

Table 113. Shanghai Pharmaceuticals Basic Information, Manufacturing Base and Competitors

Table 114. Shanghai Pharmaceuticals Major Business

Table 115. Shanghai Pharmaceuticals Non-benzodiazepine Hypnotics Product and Services

Table 116. Shanghai Pharmaceuticals Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 117. Shanghai Pharmaceuticals Recent Developments/Updates

Table 118. Shanghai Pharmaceuticals Competitive Strengths & Weaknesses

Table 119. Qilu Pharmaceutical Basic Information, Manufacturing Base and Competitors

Table 120. Qilu Pharmaceutical Major Business

Table 121. Qilu Pharmaceutical Non-benzodiazepine Hypnotics Product and Services

Table 122. Qilu Pharmaceutical Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 123. Qilu Pharmaceutical Recent Developments/Updates

Table 124. Qilu Pharmaceutical Competitive Strengths & Weaknesses

Table 125. Chengdu Kanghong Pharmaceutical Group Basic Information, Manufacturing Base and Competitors

Table 126. Chengdu Kanghong Pharmaceutical Group Major Business

Table 127. Chengdu Kanghong Pharmaceutical Group Non-benzodiazepine Hypnotics Product and Services

Table 128. Chengdu Kanghong Pharmaceutical Group Non-benzodiazepine Hypnotics Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 129. Chengdu Kanghong Pharmaceutical Group Recent Developments/Updates

Table 130. Chengdu Kanghong Pharmaceutical Group Competitive Strengths & Weaknesses

Table 131. Global Key Players of Non-benzodiazepine Hypnotics Upstream (Raw Materials)

Table 132. Global Non-benzodiazepine Hypnotics Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Non-benzodiazepine Hypnotics Picture

Figure 2. World Non-benzodiazepine Hypnotics Total Revenue: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Non-benzodiazepine Hypnotics Total Revenue (2021-2032) & (USD Million)

Figure 4. World Non-benzodiazepine Hypnotics Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Figure 5. World Non-benzodiazepine Hypnotics Revenue Market Share by Region (2021-2032), (by Headquarter Location)

Figure 6. United States Based Company Non-benzodiazepine Hypnotics Revenue (2021-2032) & (USD Million)

Figure 7. China Based Company Non-benzodiazepine Hypnotics Revenue (2021-2032) & (USD Million)

Figure 8. Europe Based Company Non-benzodiazepine Hypnotics Revenue (2021-2032) & (USD Million)

Figure 9. Japan Based Company Non-benzodiazepine Hypnotics Revenue (2021-2032) & (USD Million)

Figure 10. South Korea Based Company Non-benzodiazepine Hypnotics Revenue (2021-2032) & (USD Million)

Figure 11. ASEAN Based Company Non-benzodiazepine Hypnotics Revenue (2021-2032) & (USD Million)

Figure 12. India Based Company Non-benzodiazepine Hypnotics Revenue (2021-2032) & (USD Million)

Figure 13. Non-benzodiazepine Hypnotics Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Non-benzodiazepine Hypnotics Consumption Value (2021-2032) & (USD Million)

Figure 16. World Non-benzodiazepine Hypnotics Consumption Value Market Share by Region (2021-2032)

Figure 17. United States Non-benzodiazepine Hypnotics Consumption Value (2021-2032) & (USD Million)

Figure 18. China Non-benzodiazepine Hypnotics Consumption Value (2021-2032) & (USD Million)

Figure 19. Europe Non-benzodiazepine Hypnotics Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan Non-benzodiazepine Hypnotics Consumption Value (2021-2032) & (USD Million)

Figure 21. South Korea Non-benzodiazepine Hypnotics Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN Non-benzodiazepine Hypnotics Consumption Value (2021-2032) & (USD Million)

Figure 23. India Non-benzodiazepine Hypnotics Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of Non-benzodiazepine Hypnotics by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Non-benzodiazepine Hypnotics Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Non-benzodiazepine Hypnotics Markets in 2025

Figure 27. United States VS China: Non-benzodiazepine Hypnotics Revenue Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Non-benzodiazepine Hypnotics Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World Non-benzodiazepine Hypnotics Market Size by Type, (USD Million), 2021 & 2025 & 2032

Figure 30. World Non-benzodiazepine Hypnotics Market Size Market Share by Type in 2025

Figure 31. Zolpidem

Figure 32. Zopiclone

Figure 33. Eszopiclone

Figure 34. Zaleplon

Figure 35. World Non-benzodiazepine Hypnotics Market Size Market Share by Type (2021-2032)

Figure 36. World Non-benzodiazepine Hypnotics Market Size by Dosage Form, (USD Million), 2021 & 2025 & 2032

Figure 37. World Non-benzodiazepine Hypnotics Market Size Market Share by Dosage Form in 2025

Figure 38. Tablets

Figure 39. Capsules

Figure 40. Other

Figure 41. World Non-benzodiazepine Hypnotics Market Size Market Share by Dosage Form (2021-2032)

Figure 42. World Non-benzodiazepine Hypnotics Market Size by Product Status, (USD Million), 2021 & 2025 & 2032

Figure 43. World Non-benzodiazepine Hypnotics Market Size Market Share by Product Status in 2025

Figure 44. Originator Drugs

Figure 45. Generic Drugs

Figure 46. World Non-benzodiazepine Hypnotics Market Size Market Share by Product Status (2021-2032)

Figure 47. World Non-benzodiazepine Hypnotics Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 48. World Non-benzodiazepine Hypnotics Market Size Market Share by Application in 2025

Figure 49. Hospitals

Figure 50. Clinics

Figure 51. Other

Figure 52. World Non-benzodiazepine Hypnotics Market Size Market Share by Application (2021-2032)

Figure 53. Non-benzodiazepine Hypnotics Industrial Chain

Figure 54. Methodology

Figure 55. Research Process and Data Source

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