

Japan Paroxysmal Nocturnal Hemoglobinuria Treatment Market Size, Share & Trends Analysis Report By Action of Mechanism (Complement Inhibitors, Supportive Care, Others), By Route of Administration, By End Use, By Region, And Segment Forecasts, 2026 - 2033

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Abstracts

The Japan paroxysmal nocturnal hemoglobinuria treatment market size was valued at USD 279.95 million in 2025 and is projected to reach USD 455.53 million by 2033, growing at a CAGR of 5.88% from 2026 to 2033. This growth is driven by continuous advancements in complement inhibitor therapies, including the development of next-generation C3 and Factor B/D inhibitors that improve clinical outcomes and address unmet needs such as residual anemia.

Additionally, strong reimbursement policies and orphan drug incentives in Japan are supporting patient access to high-cost therapies and encouraging pharmaceutical innovation. Increasing disease awareness and improved diagnostic capabilities are also contributing to earlier detection and treatment, further expanding the treated patient population and sustaining market growth.

The market is primarily driven by significant advancements in complement inhibitor therapies that directly target the underlying mechanism of complement-mediated hemolysis. The transition from supportive care approaches, such as transfusions and anticoagulation, to targeted biologics has transformed clinical outcomes. Real-world evidence highlights this shift, as reported in February 2026 in the International Journal of Hematology, where 86.7% of 45 Japanese patients were treated with C5 inhibitors, resulting in a median increase in hemoglobin from 7.2 g/dL at diagnosis to 10.0 g/dL

during treatment.

Innovation within the market is further strengthened by the evolution from first-generation C5 inhibitors to next-generation therapies, including upstream complement inhibitors targeting C3 and alternative pathway factors. These advancements address residual anemia associated with extravascular hemolysis, an unmet need in earlier treatments. A September 2025 review published in *Drugs* highlighted phase III trial data involving 441 patients, demonstrating that ravulizumab was non-inferior to eculizumab at 26 and 52 weeks. Additionally, findings from the APPLY-PNH and APPOINT-PNH trials showed that oral iptacopan delivered sustained reductions in hemolysis markers and improved hemoglobin levels compared with continued anti-C5 therapy, signaling a shift toward more comprehensive, patient-friendly treatment options.

Japan's strong healthcare framework plays a crucial role in market expansion, particularly through universal coverage and supportive orphan drug policies. The government's reimbursement system, which covers approximately 70% of medical costs, ensures broad access to high-cost biologics and promotes early treatment initiation. Regulatory support further accelerates innovation, with orphan drugs receiving priority review timelines of around 9 months compared to the standard 12-month pathways. These incentives have attracted both global and domestic players, fostering a robust pipeline of advanced therapies and reinforcing Japan as a key market for the development of rare disease treatments.

Increasing diagnosis rates and disease awareness are also contributing significantly to market growth. Improved use of high-sensitivity flow cytometry and standardized diagnostic protocols has enhanced early detection of PNH, particularly among patients with aplastic anemia. An October 2024 MDPI publication reported that PNH clones were identified in 40-60% of patients, with untreated mortality exceeding 35% within 5 years, underscoring the importance of timely diagnosis. Additionally, a March 2024 study in the *International Journal of Hematology* involving 59 Japanese patients on C5 inhibitors reported a mean hemoglobin level of 10.2 g/dL, highlighting persistent symptom burden and the need for continued therapeutic optimization. Together, these factors are expanding the diagnosed patient population and sustaining long-term growth in the Japan PNH treatment market.

Japan Paroxysmal Nocturnal Hemoglobinuria Treatment Market Report Segmentation

This report forecasts revenue growth and provides an analysis on the latest trends in each of the sub-segments from 2021 to 2033. For the purpose of this report, Grand

View Research has segmented the Japan paroxysmal nocturnal hemoglobinuria treatment market on the basis of action of mechanism, route of administration, and end use:

Action of Mechanism Outlook (Revenue, USD Million, 2021 - 2033)

Complement Inhibitors

C5 Inhibitors

C3 Inhibitors

Supportive Care

Blood Transfusions

Immunosuppressant drugs

Anticoagulants

Others

Others

Route of Administration Outlook (Revenue, USD Million, 2021 - 2033)

Parenteral

Intravenous (IV) Infusion

Subcutaneous (SC) Injection

Oral

End Use Outlook (Revenue, USD Million, 2021 - 2033)

Hospitals & Specialty Clinics

Home Care Settings

Others

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Contents

CHAPTER 1. JAPAN PAROXYSMAL NOCTURNAL HEMOGLOBINURIA TREATMENT MARKET: METHODOLOGY AND SCOPE

- 1.1. Market Segmentation and Scope
 - 1.1.1. Segment Definitions
 - 1.1.1.1. Action of Mechanism Method
 - 1.1.1.2. Route of Administration Segment
 - 1.1.1.3. End Use Segment
- 1.2. Regional Scope
- 1.3. Estimates and Forecast Timeline
- 1.4. Objectives
 - 1.4.1. Objective -
 - 1.4.2. Objective -
 - 1.4.3. Objective -
- 1.5. Research Methodology
- 1.6. Information Procurement
 - 1.6.1. Purchased Database
 - 1.6.2. GVR's Internal Database
 - 1.6.3. Secondary Sources
 - 1.6.4. Primary Research
- 1.7. Information or Data Analysis
 - 1.7.1. Data Analysis Models
- 1.8. Market Formulation & Validation
- 1.9. Model Details
 - 1.9.1. Commodity Flow Analysis
- 1.10. List of Secondary Sources
- 1.11. List of Abbreviations

CHAPTER 2. JAPAN PAROXYSMAL NOCTURNAL HEMOGLOBINURIA TREATMENT MARKET: EXECUTIVE SUMMARY

- 2.1. Market Snapshot
- 2.2. Action of Mechanism Snapshot
- 2.3. Route of Administration Snapshot
- 2.4. End Use Snapshot
- 2.5. Competitive Landscape Snapshot

CHAPTER 3. JAPAN PAROXYSMAL NOCTURNAL HEMOGLOBINURIA TREATMENT MARKET VARIABLES, TRENDS, & SCOPE

- 3.1. Market Segmentation and Scope
- 3.2. Market Lineage Outlook
 - 3.2.1. Parent Market Outlook
 - 3.2.2. Related/Ancillary Market Outlook
- 3.3. Market Dynamics
- 3.4. Market Drivers Analysis
- 3.5. Market Restraint Analysis
- 3.6. Porter's Five Forces Analysis
- 3.7. PESTLE Analysis
- 3.8. Pipeline Analysis

CHAPTER 4. JAPAN PAROXYSMAL NOCTURNAL HEMOGLOBINURIA TREATMENT MARKET: ACTION OF MECHANISM ESTIMATES & TREND ANALYSIS

- 4.1. Japan Paroxysmal Nocturnal Hemoglobinuria Treatment Market: Action of Mechanism Dashboard
- 4.2. Japan Paroxysmal Nocturnal Hemoglobinuria Treatment Market: Action of Mechanism Movement Analysis
- 4.3. Japan Paroxysmal Nocturnal Hemoglobinuria Treatment Market by therapy, Revenue
- 4.4. Complement Inhibitors
 - 4.4.1. Complement Inhibitors market estimates and forecasts 2021 to 2033 (USD Million)
 - 4.4.2. C5 Inhibitors
 - 4.4.2.1. C5 Inhibitors market estimates and forecasts 2021 to 2033 (USD Million)
 - 4.4.3. C3 Inhibitors
 - 4.4.3.1. C3 Inhibitors market estimates and forecasts 2021 to 2033 (USD Million)
- 4.5. Supportive Care
 - 4.5.1. Supportive Care market estimates and forecasts 2021 to 2033 (USD Million)
 - 4.5.2. Blood Transfusions
 - 4.5.2.1. Blood Transfusions market estimates and forecasts 2021 to 2033 (USD Million)
 - 4.5.3. Immunosuppressant
 - 4.5.3.1. Immunosuppressant drugs market estimates and forecasts 2021 to 2033 (USD Million)

4.5.4. Anticoagulants

4.5.4.1. Anticoagulants market estimates and forecasts 2021 to 2033 (USD Million)

4.5.5. Others

4.5.5.1. Others market estimates and forecasts 2021 to 2033 (USD Million)

4.6. Others

4.6.1. Others market estimates and forecasts 2021 to 2033 (USD Million)

CHAPTER 5. JAPAN PAROXYSMAL NOCTURNAL HEMOGLOBINURIA TREATMENT MARKET: ROUTE OF ADMINISTRATION ESTIMATES & TREND ANALYSIS

5.1. Japan Paroxysmal Nocturnal Hemoglobinuria Treatment Market: Route of Administration Dashboard

5.2. Japan Paroxysmal Nocturnal Hemoglobinuria Treatment Market: Route of Administration Movement Analysis

5.3. Japan Paroxysmal Nocturnal Hemoglobinuria Treatment Market by Route of Administration, Revenue

5.4. Parenteral

5.4.1. Parenteral market estimates and forecasts 2021 to 2033 (USD Million)

5.4.2. Intravenous (IV) Infusion

5.4.2.1. Intravenous (IV) Infusion market estimates and forecasts 2021 to 2033 (USD Million)

5.4.3. Subcutaneous (SC) Injection

5.4.3.1. Subcutaneous (SC) Injection market estimates and forecasts 2021 to 2033 (USD Million)

5.5. Oral

5.5.1. Oral market estimates and forecasts 2021 to 2033 (USD Million)

CHAPTER 6. JAPAN PAROXYSMAL NOCTURNAL HEMOGLOBINURIA TREATMENT MARKET: END USE ESTIMATES & TREND ANALYSIS

6.1. Japan Paroxysmal Nocturnal Hemoglobinuria Treatment Market: End Use Dashboard

6.2. Japan Paroxysmal Nocturnal Hemoglobinuria Treatment Market: End Use Movement Analysis

6.3. Japan Paroxysmal Nocturnal Hemoglobinuria Treatment Market by End Use, Revenue

6.4. Hospitals & Specialty Clinics

6.4.1. Hospitals & Specialty Clinics market estimates and forecasts 2021 to 2033 (USD Million)

Million)

6.5. Home Care Settings

6.5.1. Home Care Settings market estimates and forecasts 2021 to 2033 (USD Million)

6.6. Others

6.6.1. Others market estimates and forecasts 2021 to 2033 (USD Million)

CHAPTER 7. COMPETITIVE LANDSCAPE

7.1. Recent Developments & Impact Analysis, By Key Market Participants

7.2. Company/Competition Categorization

7.3. Vendor Landscape

7.3.1. List of key distributors and channel partners

7.3.2. Key customers

7.3.3. Key company market share analysis, 2025

7.3.4. AstraZeneca

7.3.4.1. Company overview

7.3.4.2. Financial performance

7.3.4.3. Action of Mechanism benchmarking

7.3.4.4. Strategic initiatives

7.3.5. Apellis Pharmaceuticals

7.3.5.1. Company overview

7.3.5.2. Financial performance

7.3.5.3. Action of Mechanism benchmarking

7.3.5.4. Strategic initiatives

7.3.6. BioCryst Pharmaceuticals

7.3.6.1. Company overview

7.3.6.2. Financial performance

7.3.6.3. Action of Mechanism benchmarking

7.3.6.4. Strategic initiatives

7.3.7. Novartis AG

7.3.7.1. Company overview

7.3.7.2. Financial performance

7.3.7.3. Action of Mechanism benchmarking

7.3.7.4. Strategic initiatives

7.3.8. F. Hoffmann-La Roche Ltd

7.3.8.1. Company overview

7.3.8.2. Financial performance

7.3.8.3. Action of Mechanism benchmarking

7.3.8.4. Strategic initiatives

7.3.9. Amgen Inc.

7.3.9.1. Company overview

7.3.9.2. Financial performance

7.3.9.3. Action of Mechanism benchmarking

7.3.9.4. Strategic initiatives

7.3.10. Regeneron Pharmaceuticals

7.3.10.1. Company overview

7.3.10.2. Financial performance

7.3.10.3. Action of Mechanism benchmarking

7.3.10.4. Strategic initiatives

7.3.11. Sanofi

7.3.11.1. Company overview

7.3.11.2. Financial performance

7.3.11.3. Action of Mechanism benchmarking

7.3.11.4. Strategic initiatives

7.3.12. Pfizer Inc.

7.3.12.1. Company overview

7.3.12.2. Financial performance

7.3.12.3. Action of Mechanism benchmarking

7.3.12.4. Strategic initiatives

7.3.13. Johnson & Johnson

7.3.13.1. Company overview

7.3.13.2. Financial performance

7.3.13.3. Action of Mechanism benchmarking

7.3.13.4. Strategic initiatives

List Of Tables

LIST OF TABLES

Table 1 List of Secondary Sources

Table 2 List of Abbreviation

Table 3 Japan Paroxysmal Nocturnal Hemoglobinuria Treatment Market, By Action of Mechanism, 2021 - 2033 (USD Million)

Table 4 Japan Paroxysmal Nocturnal Hemoglobinuria Treatment Market, By Route of Administration, 2021 - 2033 (USD Million)

Table 5 Japan Paroxysmal Nocturnal Hemoglobinuria Treatment Market, By End-Use, 2021 - 2033 (USD Million)

List Of Figures

LIST OF FIGURES

Fig. 1 Japan paroxysmal nocturnal hemoglobinuria treatment market segmentation

Fig. 2 Market research process

Fig. 3 Data triangulation techniques

Fig. 4 Primary research pattern

Fig. 5 Market research approaches

Fig. 6 Value-chain-based sizing & forecasting

Fig. 7 QFD modelling for market share assessment.

Fig. 8 Market formulation & validation

Fig. 9 Japan paroxysmal nocturnal hemoglobinuria treatment market snapshot

Fig. 10 Parent market outlook

Fig. 11 Related/ancillary market outlook.

Fig. 12 Penetration and growth prospect mapping

Fig. 13 Japan paroxysmal nocturnal hemoglobinuria treatment market: Action of Mechanism movement analysis

Fig. 14 Japan paroxysmal nocturnal hemoglobinuria treatment market: Action of Mechanism outlook and key takeaways

Fig. 15 Complement Inhibitors market estimates and forecast, 2021 - 2033 (USD Million)

Fig. 16 C5 Inhibitors market estimates and forecast, 2021 - 2033 (USD Million)

Fig. 17 C3 Inhibitors market estimates and forecast, 2021 - 2033 (USD Million)

Fig. 18 Supportive Care market estimates and forecast, 2021 - 2033 (USD Million)

Fig. 19 Blood Transfusions market estimates and forecast, 2021 - 2033 (USD Million)

Fig. 20 Immunosuppressant drugs market estimates and forecast, 2021 - 2033 (USD Million)

Fig. 21 Anticoagulants market estimates and forecast, 2021 - 2033 (USD Million)

Fig. 22 Others market estimates and forecast, 2021 - 2033 (USD Million)

Fig. 23 Japan paroxysmal nocturnal hemoglobinuria treatment market: Route of Administration movement analysis

Fig. 24 Japan paroxysmal nocturnal hemoglobinuria treatment market: Route of Administration outlook and key takeaways

Fig. 25 Parenteral market estimates and forecast, 2021 - 2033 (USD Million)

Fig. 26 Intravenous (IV) Infusion market estimates and forecast, 2021 - 2033 (USD Million)

Fig. 27 Subcutaneous (SC) Injection market estimates and forecast, 2021 - 2033 (USD Million)

Fig. 28 Oral market estimates and forecast, 2021 - 2033 (USD Million)

Fig. 29 Japan paroxysmal nocturnal hemoglobinuria treatment market: End Use movement analysis

Fig. 30 Japan paroxysmal nocturnal hemoglobinuria treatment market: End Use outlook and key takeaways

Fig. 31 Hospitals & Specialty Clinics market estimates and forecast, 2021 - 2033 (USD Million)

Fig. 32 Home Care Settings market estimates and forecast, 2021 - 2033 (USD Million)

Fig. 33 Others market estimates and forecast, 2021 - 2033 (USD Million)

Fig. 34 Market share of key market players- Japan paroxysmal nocturnal hemoglobinuria treatment market

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