

# Partial Epilepsy Market: Epidemiology, Industry Trends, Share, Size, Growth, Opportunity, and Forecast 2024-2034

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## Abstracts

The 7 major partial epilepsy markets are expected to exhibit a CAGR of 9.64% during 2024-2034.

The partial epilepsy market has been comprehensively analyzed in IMARC's new report titled "Partial Epilepsy Market: Epidemiology, Industry Trends, Share, Size, Growth, Opportunity, and Forecast 2024-2034". Partial epilepsy, also known as focal epilepsy, is a type of epilepsy in which seizures begin in a specific area or focus of the brain rather than diffusely across the entire brain. The symptoms associated with the ailment vary depending on the location of the seizure focus. Simple partial seizures may cause sensory disturbances (such as tingling or numbness), visual or auditory hallucinations, altered taste or smell, involuntary movements, intense emotions, etc. Complex partial seizures often involve confusion, unresponsiveness, repetitive motions, post-seizure disorientation, etc. The diagnostic process typically begins with a detailed medical history, including a description of the seizure episodes and any associated symptoms or triggers. The primary diagnostic tool used is an electroencephalogram (EEG), which records electrical activity in the brain and can detect abnormalities indicative of seizures. Additionally, numerous imaging studies, such as MRI and CT scans, are often utilized to identify any structural defects in the brain, like tumors, vascular malformations, signs of past brain injury, etc., that might be the underlying cause of seizures. Various other procedures, including neuropsychological assessments and blood tests, may be conducted to rule out conditions that could induce similar symptoms.

The increasing cases of head injuries, such as those caused by trauma, accidents, falls, etc., that disrupt normal brain functioning are primarily driving the partial epilepsy

market. In addition to this, the rising prevalence of various associated risk factors, including certain developmental disorders like neurofibromatosis, structural abnormalities in the brain, hormonal changes, etc., is also creating a positive outlook for the market. Moreover, the widespread adoption of antiepileptic drugs, such as carbamazepine, lamotrigine, levetiracetam, oxcarbazepine, etc., for stabilizing abnormal electrical activity in the brain and reducing the likelihood of seizures is further bolstering the market growth. Apart from this, the escalating application of responsive neurostimulation, which involves the implantation of a device directly into the brain to deliver electrical stimulation when unusual activity is detected, thereby helping to disrupt seizures before they occur, is acting as another significant growth-inducing factor. Additionally, the emerging popularity of non-invasive brain stimulation techniques, including transcranial direct current stimulation (tDCS), since they aid in modulating brain activity and improving overall seizure control, is expected to drive the partial epilepsy market during the forecast period.

IMARC Group's new report provides an exhaustive analysis of the partial epilepsy market in the United States, EU4 (Germany, Spain, Italy, and France), United Kingdom, and Japan. This includes treatment practices, in-market, and pipeline drugs, share of individual therapies, market performance across the seven major markets, market performance of key companies and their drugs, etc. The report also provides the current and future patient pool across the seven major markets. According to the report, the United States has the largest patient pool for partial epilepsy and also represents the largest market for its treatment. Furthermore, the current treatment practice/algorithm, market drivers, challenges, opportunities, reimbursement scenario, unmet medical needs, etc., have also been provided in the report. This report is a must-read for manufacturers, investors, business strategists, researchers, consultants, and all those who have any kind of stake or are planning to foray into the partial epilepsy market in any manner.

#### Recent Developments:

In January 2024, Medtronic plc announced the U.S. FDA approval of its Percept RC deep brain stimulation (DBS) system. Percept neurostimulators use slim cables to send electrical signals to specific brain targets affected by degenerative neurological illnesses such as epilepsy.

In December 2023, Neurona Therapeutics presented positive preliminary clinical outcomes from the first cohort of five subjects in its ongoing single-arm, open-label phase I/II clinical trial of NRTX-1001. This experimental allogeneic cell therapy candidate is being explored for the treatment of drug-resistant mesial temporal lobe epilepsy (MTLE).

In October 2023, Xenon Pharmaceuticals Inc. stated that the medical journal JAMA Neurology released peer-reviewed effectiveness and safety findings from the X-TOLE Phase 2b randomized clinical trial of XEN1101, a new potassium channel opener, in adults with focal epilepsy. The safety and efficacy results of this clinical trial encouraged the future clinical development in epilepsy of XEN1101, which is currently being investigated in Phase 3 clinical studies in patients with focal onset seizures (FOS) and primary generalized tonic-clonic seizures.

In September 2023, Biohaven Ltd. released preliminary analyses and positive biomarker data from its exploratory Phase 1 electroencephalogram (EEG) biomarker study. The findings confirm BHV-7000's central nervous system activity at projected therapeutic concentrations, as well as dose-dependent and time-dependent changes in EEG spectral power, which are consistent with EEG effects seen with other antiseizure medications approved for the treatment of epilepsy.

#### Key Highlights:

According to the World Health Organization, epilepsy affects around 50 million people across the globe, making it one of the most common neurological illnesses.

Epilepsy characterized by partial seizures represented 20% to 66% of all epilepsies. Simple partial seizures affect 6 to 12% of epilepsy patients, whereas complex partial seizures occur in about 36% of individuals suffering from epilepsy.

The most common type of partial epilepsy in children is benign partial epilepsy with centrotemporal spikes, which occurs between the ages of 5 and 10.

In the United States, the incidence of all partial seizures for persons aged one to 65 years is around 20 cases per 100,000 population.

#### Drugs:

Carbatrol (carbamazepine) is an anticonvulsant or anti-epileptic drug used to relieve nerve pain, including trigeminal neuralgia. This drug works by slowing the spread of seizure activity in the nervous system and restoring the natural balance of nerve activity.

XEN-1101 is under development by Xenon Pharmaceuticals for the treatment of partial seizures (focal-onset seizures). The therapeutic candidate is a tiny molecule taken orally in a powder-in-capsule form. It works by targeting the potassium voltage-gated channel subfamily KQT Member 2 and 3 (KCNQ2/3).

ENX-101 is an investigational precision targeted gamma-aminobutyric acid A (GABA-A) positive allosteric modulator that improves neurotransmission at receptors with  $\alpha 2$ ,  $\alpha 3$ , and  $\alpha 5$  subunits while blocking  $\alpha 1$ . This profile may improve antiseizure efficacy and safety while decreasing the negative consequences of  $\alpha 1$ -mediated GABAergic

neurotransmission. ENX-101 has proven to be well tolerated in clinical trials when administered once daily orally.

### Time Period of the Study

Base Year: 2023

Historical Period: 2018-2023

Market Forecast: 2024-2034

### Countries Covered

United States

Germany

France

United Kingdom

Italy

Spain

Japan

### Analysis Covered Across Each Country

Historical, current, and future epidemiology scenario

Historical, current, and future performance of the partial epilepsy market

Historical, current, and future performance of various therapeutic categories in the market

Sales of various drugs across the partial epilepsy market

Reimbursement scenario in the market

In-market and pipeline drugs

### Competitive Landscape:

This report also provides a detailed analysis of the current partial epilepsy marketed drugs and late-stage pipeline drugs.

### In-Market Drugs

Drug Overview

Mechanism of Action

Regulatory Status

Clinical Trial Results  
Drug Uptake and Market Performance

Late-Stage Pipeline Drugs

Drug Overview  
Mechanism of Action  
Regulatory Status  
Clinical Trial Results  
Drug Uptake and Market Performance

\*Kindly note that the drugs in the above table only represent a partial list of marketed/pipeline drugs, and the complete list has been provided in the report.

Key Questions Answered in this Report:  
Market Insights

How has the partial epilepsy market performed so far and how will it perform in the coming years?

What are the markets shares of various therapeutic segments in 2023 and how are they expected to perform till 2034?

What was the country-wise size of the partial epilepsy market across the seven major markets in 2023 and what will it look like in 2034?

What is the growth rate of the partial epilepsy market across the seven major markets and what will be the expected growth over the next ten years?

What are the key unmet needs in the market?

Epidemiology Insights

What is the number of prevalent cases (2018-2034) of partial epilepsy across the seven major markets?

What is the number of prevalent cases (2018-2034) of partial epilepsy by age across the seven major markets?

What is the number of prevalent cases (2018-2034) of partial epilepsy by gender across the seven major markets?

How many patients are diagnosed (2018-2034) with partial epilepsy across the seven major markets?

What is the size of the partial epilepsy patient pool (2018-2023) across the seven major

markets?

What would be the forecasted patient pool (2024-2034) across the seven major markets?

What are the key factors driving the epidemiological trend of partial epilepsy?

What will be the growth rate of patients across the seven major markets?

Partial Epilepsy: Current Treatment Scenario, Marketed Drugs and Emerging Therapies

What are the current marketed drugs and what are their market performance?

What are the key pipeline drugs and how are they expected to perform in the coming years?

How safe are the current marketed drugs and what are their efficacies?

How safe are the late-stage pipeline drugs and what are their efficacies?

What are the current treatment guidelines for partial epilepsy drugs across the seven major markets?

Who are the key companies in the market and what are their market shares?

What are the key mergers and acquisitions, licensing activities, collaborations, etc. related to the partial epilepsy market?

What are the key regulatory events related to the partial epilepsy market?

What is the structure of clinical trial landscape by status related to the partial epilepsy market?

What is the structure of clinical trial landscape by phase related to the partial epilepsy market?

What is the structure of clinical trial landscape by route of administration related to the partial epilepsy market?

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