

Antipsychotic Drug Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Product Type

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Abstracts

Antipsychotic Drug Market Summary

The global antipsychotic drug market represents a critical segment within the broader central nervous system (CNS) therapeutics industry, playing a pivotal role in addressing severe psychiatric disorders such as schizophrenia, bipolar disorder, and other psychotic conditions. These drugs are primarily used to manage symptoms such as hallucinations, delusions, mood disturbances, and disorganized thinking. While not curative, antipsychotics are essential in reducing relapse rates, improving patient quality of life, and enabling better long-term management of psychiatric disorders.

Antipsychotic drugs are broadly categorized into typical (first-generation) and atypical (second- and third-generation) classes. While typical drugs such as haloperidol remain in use due to affordability and efficacy, atypical antipsychotics such as risperidone, olanzapine, quetiapine, and aripiprazole dominate the market because of improved safety profiles and broader therapeutic applications. The ongoing shift towards atypical and third-generation drugs reflects both clinical preference and pharmaceutical innovation focused on reducing metabolic side effects and improving patient adherence. The industry is also witnessing a shift toward long-acting injectables (LAIs), which improve compliance by reducing dosing frequency, and toward precision medicine approaches incorporating digital adherence technologies and biomarker-guided therapies. Future growth is expected to be influenced by novel agents targeting new mechanisms, such as glutamatergic modulation and serotonin-dopamine activity regulation. The market is estimated to reach a value between USD 24 billion and USD 48 billion by 2025, with a projected compound annual growth rate (CAGR) of 5.5% to 8.5% through 2030. Growth is driven by increasing prevalence of mental health conditions globally, rising awareness and diagnosis rates, innovations in drug

development including atypical antipsychotics, and expanding access to healthcare systems in emerging economies. However, challenges such as side effects, high discontinuation rates, and limited access to mental health care in many regions continue to influence market dynamics.

Market Size and Growth Drivers

Global demand is shaped by multiple drivers:

Epidemiological trends: According to WHO, schizophrenia affects approximately 24 million people globally, or about 0.32% of the population, with higher prevalence in adults (0.45%). The chronic nature of the disease ensures persistent demand for long-term pharmacological treatment.

Unmet medical need: Only about 31.3% of people with psychosis currently receive specialist mental health care, highlighting a substantial treatment gap and significant opportunities for market expansion, particularly in low- and middle-income countries.

Innovation pipeline: Development of novel antipsychotics with fewer side effects, improved efficacy, and enhanced patient adherence supports continued industry growth.

Healthcare policy: Increasing government focus on mental health, destigmatization efforts, and integration of psychiatric care into primary healthcare systems are expanding the patient pool receiving pharmacological interventions.

Regional Market Trends

North America is the largest market for antipsychotic drugs, supported by advanced healthcare systems, high diagnosis rates, and strong commercial presence of leading pharmaceutical companies. Growth rates are estimated at 5–7% annually, with the U.S. leading due to significant investment in psychiatric research, broad insurance coverage, and strong adoption of innovative therapies.

Europe demonstrates steady growth at 5–6.5% annually, driven by established healthcare infrastructure, aging populations, and expanding mental health initiatives.

Countries such as Germany, France, and the U.K. remain key demand centers, with ongoing investments in community-based psychiatric care.

Asia-Pacific represents the fastest-growing region with projected growth of 7–10% annually, fueled by rising awareness of mental health conditions, expanding healthcare access, and increasing government investment in psychiatric services. China, Japan, and India are emerging as critical growth markets, with both multinational and domestic firms actively investing.

Latin America and Middle East & Africa show slower but steady development with growth of 4–6% annually, limited by infrastructure challenges, stigma, and lower access to psychiatric specialists. However, improving healthcare systems and international collaborations may unlock growth potential over the next decade.

Market Segmentation by Drug Type

The antipsychotic drug market is segmented across several major compounds:

Clozapine: A key treatment for refractory schizophrenia, but limited by risk of agranulocytosis requiring blood monitoring.

Quetiapine: Widely used for schizophrenia, bipolar disorder, and off-label for anxiety and depression.

Aripiprazole: A third-generation antipsychotic with strong demand due to efficacy and lower metabolic side effects.

Risperidone: Remains widely prescribed, particularly in long-acting injectable forms.

Olanzapine: Strong efficacy but limited by metabolic side effects.

Haloperidol: A first-generation drug primarily used in acute settings and lower-income countries.

Lurasidone, Paliperidone, Brexpiprazole, Cariprazine, Lumateperone, Iloperidone: Represent newer-generation or niche drugs addressing unmet needs in tolerability and adherence. Supported by adoption in developed markets and regulatory approvals in new geographies.

Others: Includes pipeline drugs and region-specific generics with varied performance.

Competitive Landscape

The antipsychotic drug market is highly competitive, dominated by multinational pharmaceutical firms and supported by a robust generic drug ecosystem.

AbbVie maintains a strong position through its psychiatry portfolio, leveraging biologics and advanced small molecules.

AstraZeneca has developed a diversified psychiatry pipeline, including atypical agents widely adopted globally.

Johnson & Johnson (Janssen) is a market leader with risperidone- and paliperidone-based products, particularly in long-acting injectable formulations.

Eli Lilly established itself early in the atypical segment with drugs like olanzapine, continuing to invest in neuroscience.

HLS Therapeutics Inc. specializes in central nervous system therapies, with a growing focus on schizophrenia treatments in North America.

Otsuka Pharmaceutical Co. Ltd., often in collaboration with Lundbeck, has introduced innovative therapies such as aripiprazole and brexpiprazole.

Sumitomo Pharma continues to expand its psychiatry pipeline with focus on novel mechanisms.

Vanda Pharmaceuticals Inc. and Alkermes are active in developing differentiated antipsychotics with improved tolerability.

Teva Pharmaceutical plays a critical role in the generics market, ensuring affordability and accessibility of widely prescribed antipsychotics.

Bristol-Myers Squibb has made targeted investments in neuroscience, focusing on emerging therapies with novel pathways.

Porter's Five Forces Analysis

Supplier Power: Moderate

Raw material supply for pharmaceutical APIs is relatively diversified, but stringent regulatory requirements and manufacturing complexity create barriers for alternative suppliers.

Buyer Power: High

Payers, healthcare providers, and governments exert significant influence on pricing and formulary inclusion, especially as generics are widely available.

Threat of New Entrants: Low to Moderate

High R&D costs, regulatory hurdles, and the need for clinical trial validation limit new entrants, though generic manufacturers can still enter as patents expire.

Threat of Substitutes: Low

Few therapeutic substitutes exist for managing schizophrenia and psychosis; however, non-pharmacological interventions (psychotherapy, digital therapeutics) may complement rather than replace drug therapy.

Competitive Rivalry: High

Competition is intense among established multinational companies, generics producers, and emerging biotech firms. Differentiation increasingly depends on safety profile, formulation innovation, and patient adherence solutions.

Market Opportunities and Challenges

Opportunities:

Rising prevalence of psychiatric disorders worldwide and growing emphasis on early diagnosis.

Expanding adoption of long-acting injectable formulations to improve adherence and reduce relapse.

Increased government investment in mental health infrastructure, especially in Asia-Pacific and emerging economies.

Advancements in neuroscience and digital health integration supporting precision psychiatry.

Pipeline innovation, including agents targeting novel pathways such as glutamate modulation, offers new therapeutic options.

Challenges:

Significant treatment gap: the majority of schizophrenia patients worldwide do not receive adequate psychiatric care.

Persistent side effects including weight gain, metabolic syndrome, and cardiovascular risk, which contribute to high discontinuation rates.

Stigma surrounding mental illness continues to limit care-seeking behavior in many regions.

High development costs and clinical trial risks associated with psychiatric drug innovation.

Pricing pressures from generic competition and government cost-containment policies.

Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

3.1 Research Scope

3.2 Research Sources

3.2.1 Data Sources

3.2.2 Assumptions

3.3 Research Method

Chapter Four Market Landscape

4.1 Market Overview

4.2 Classification/Types

4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

5.1 Introduction

5.2 Drivers

5.3 Restraints

5.4 Opportunities

5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

6.1 Upstream/Suppliers Analysis

6.2 Antipsychotic Drug Analysis

6.2.1 Technology Analysis

6.2.2 Cost Analysis

6.2.3 Market Channel Analysis

6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

7.1 Latest News

7.2 Merger and Acquisition

- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

CHAPTER 8 HISTORICAL AND FORECAST ANTIPSYCHOTIC DRUG MARKET IN NORTH AMERICA (2020-2030)

- 8.1 Antipsychotic Drug Market Size
- 8.2 Antipsychotic Drug Market by End Use
- 8.3 Competition by Players/Suppliers
- 8.4 Antipsychotic Drug Market Size by Type
- 8.5 Key Countries Analysis
 - 8.5.1 United States
 - 8.5.2 Canada
 - 8.5.3 Mexico

CHAPTER 9 HISTORICAL AND FORECAST ANTIPSYCHOTIC DRUG MARKET IN SOUTH AMERICA (2020-2030)

- 9.1 Antipsychotic Drug Market Size
- 9.2 Antipsychotic Drug Market by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Antipsychotic Drug Market Size by Type
- 9.5 Key Countries Analysis
 - 9.5.1 Brazil
 - 9.5.2 Argentina
 - 9.5.3 Chile
 - 9.5.4 Peru

CHAPTER 10 HISTORICAL AND FORECAST ANTIPSYCHOTIC DRUG MARKET IN ASIA & PACIFIC (2020-2030)

- 10.1 Antipsychotic Drug Market Size
- 10.2 Antipsychotic Drug Market by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Antipsychotic Drug Market Size by Type
- 10.5 Key Countries Analysis
 - 10.5.1 China
 - 10.5.2 India
 - 10.5.3 Japan

- 10.5.4 South Korea
- 10.5.5 Southeast Asia
- 10.5.6 Australia

CHAPTER 11 HISTORICAL AND FORECAST ANTIPSYCHOTIC DRUG MARKET IN EUROPE (2020-2030)

- 11.1 Antipsychotic Drug Market Size
- 11.2 Antipsychotic Drug Market by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Antipsychotic Drug Market Size by Type
- 11.5 Key Countries Analysis
 - 11.5.1 Germany
 - 11.5.2 France
 - 11.5.3 United Kingdom
 - 11.5.4 Italy
 - 11.5.5 Spain
 - 11.5.6 Belgium
 - 11.5.7 Netherlands
 - 11.5.8 Austria
 - 11.5.9 Poland
 - 11.5.10 Russia

CHAPTER 12 HISTORICAL AND FORECAST ANTIPSYCHOTIC DRUG MARKET IN MEA (2020-2030)

- 12.1 Antipsychotic Drug Market Size
- 12.2 Antipsychotic Drug Market by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Antipsychotic Drug Market Size by Type
- 12.5 Key Countries Analysis
 - 12.5.1 Egypt
 - 12.5.2 Israel
 - 12.5.3 South Africa
 - 12.5.4 Gulf Cooperation Council Countries
 - 12.5.5 Turkey

CHAPTER 13 SUMMARY FOR GLOBAL ANTIPSYCHOTIC DRUG MARKET (2020-2025)

- 13.1 Antipsychotic Drug Market Size
- 13.2 Antipsychotic Drug Market by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Antipsychotic Drug Market Size by Type

CHAPTER 14 GLOBAL ANTIPSYCHOTIC DRUG MARKET FORECAST (2025-2030)

- 14.1 Antipsychotic Drug Market Size Forecast
- 14.2 Antipsychotic Drug Application Forecast
- 14.3 Competition by Players/Suppliers
- 14.4 Antipsychotic Drug Type Forecast

CHAPTER 15 ANALYSIS OF GLOBAL KEY VENDORS

15.1 AbbVie

- 15.1.1 Company Profile
- 15.1.2 Main Business and Antipsychotic Drug Information
- 15.1.3 SWOT Analysis of AbbVie
- 15.1.4 AbbVie Antipsychotic Drug Revenue, Gross Margin and Market Share (2020-2025)

15.2 AstraZeneca

- 15.2.1 Company Profile
- 15.2.2 Main Business and Antipsychotic Drug Information
- 15.2.3 SWOT Analysis of AstraZeneca
- 15.2.4 AstraZeneca Antipsychotic Drug Revenue, Gross Margin and Market Share (2020-2025)

15.3 Johnson & Johnson

- 15.3.1 Company Profile
- 15.3.2 Main Business and Antipsychotic Drug Information
- 15.3.3 SWOT Analysis of Johnson & Johnson
- 15.3.4 Johnson & Johnson Antipsychotic Drug Revenue, Gross Margin and Market Share (2020-2025)

15.4 Eli Lilly

- 15.4.1 Company Profile
- 15.4.2 Main Business and Antipsychotic Drug Information
- 15.4.3 SWOT Analysis of Eli Lilly
- 15.4.4 Eli Lilly Antipsychotic Drug Revenue, Gross Margin and Market Share (2020-2025)

15.5 HLS Therapeutics Inc.

15.5.1 Company Profile

15.5.2 Main Business and Antipsychotic Drug Information

15.5.3 SWOT Analysis of HLS Therapeutics Inc.

15.5.4 HLS Therapeutics Inc. Antipsychotic Drug Revenue, Gross Margin and Market Share (2020-2025)

15.6 Otsuka Pharmaceutical Co. Ltd.

15.6.1 Company Profile

15.6.2 Main Business and Antipsychotic Drug Information

15.6.3 SWOT Analysis of Otsuka Pharmaceutical Co. Ltd.

15.6.4 Otsuka Pharmaceutical Co. Ltd. Antipsychotic Drug Revenue, Gross Margin and Market Share (2020-2025)

15.7 Sumitomo Pharma

15.7.1 Company Profile

15.7.2 Main Business and Antipsychotic Drug Information

15.7.3 SWOT Analysis of Sumitomo Pharma

15.7.4 Sumitomo Pharma Antipsychotic Drug Revenue, Gross Margin and Market Share (2020-2025)

15.8 Otsuka Pharmaceutical

15.8.1 Company Profile

15.8.2 Main Business and Antipsychotic Drug Information

15.8.3 SWOT Analysis of Otsuka Pharmaceutical

15.8.4 Otsuka Pharmaceutical Antipsychotic Drug Revenue, Gross Margin and Market Share (2020-2025)

15.9 Vanda Pharmaceuticals Inc.

15.9.1 Company Profile

15.9.2 Main Business and Antipsychotic Drug Information

15.9.3 SWOT Analysis of Vanda Pharmaceuticals Inc.

15.9.4 Vanda Pharmaceuticals Inc. Antipsychotic Drug Revenue, Gross Margin and Market Share (2020-2025)

15.10 Teva Pharmaceutical

15.10.1 Company Profile

15.10.2 Main Business and Antipsychotic Drug Information

15.10.3 SWOT Analysis of Teva Pharmaceutical

15.10.4 Teva Pharmaceutical Antipsychotic Drug Revenue, Gross Margin and Market Share (2020-2025)

15.11 Alkermes

15.11.1 Company Profile

15.11.2 Main Business and Antipsychotic Drug Information

15.11.3 SWOT Analysis of Alkermes

15.11.4 Alkermes Antipsychotic Drug Revenue, Gross Margin and Market Share
(2020-2025)

15.12 Bristol-Myers Squibb

15.12.1 Company Profile

15.12.2 Main Business and Antipsychotic Drug Information

15.12.3 SWOT Analysis of Bristol-Myers Squibb

15.12.4 Bristol-Myers Squibb Antipsychotic Drug Revenue, Gross Margin and Market
Share (2020-2025)

Please ask for sample pages for full companies list

Tables & Figures

TABLES AND FIGURES

- Table Abbreviation and Acronyms
- Table Research Scope of Antipsychotic Drug Report
- Table Data Sources of Antipsychotic Drug Report
- Table Major Assumptions of Antipsychotic Drug Report
- Figure Market Size Estimated Method
- Figure Major Forecasting Factors
- Figure Antipsychotic Drug Picture
- Table Antipsychotic Drug Classification
- Table Antipsychotic Drug Applications
- Table Drivers of Antipsychotic Drug Market
- Table Restraints of Antipsychotic Drug Market
- Table Opportunities of Antipsychotic Drug Market
- Table Threats of Antipsychotic Drug Market
- Table Covid-19 Impact For Antipsychotic Drug Market
- Table Raw Materials Suppliers
- Table Different Production Methods of Antipsychotic Drug
- Table Cost Structure Analysis of Antipsychotic Drug
- Table Key End Users
- Table Latest News of Antipsychotic Drug Market
- Table Merger and Acquisition
- Table Planned/Future Project of Antipsychotic Drug Market
- Table Policy of Antipsychotic Drug Market
- Table 2020-2030 North America Antipsychotic Drug Market Size
- Figure 2020-2030 North America Antipsychotic Drug Market Size and CAGR
- Table 2020-2030 North America Antipsychotic Drug Market Size by Application
- Table 2020-2025 North America Antipsychotic Drug Key Players Revenue
- Table 2020-2025 North America Antipsychotic Drug Key Players Market Share
- Table 2020-2030 North America Antipsychotic Drug Market Size by Type
- Table 2020-2030 United States Antipsychotic Drug Market Size
- Table 2020-2030 Canada Antipsychotic Drug Market Size
- Table 2020-2030 Mexico Antipsychotic Drug Market Size
- Table 2020-2030 South America Antipsychotic Drug Market Size
- Figure 2020-2030 South America Antipsychotic Drug Market Size and CAGR
- Table 2020-2030 South America Antipsychotic Drug Market Size by Application
- Table 2020-2025 South America Antipsychotic Drug Key Players Revenue

Table 2020-2025 South America Antipsychotic Drug Key Players Market Share
Table 2020-2030 South America Antipsychotic Drug Market Size by Type
Table 2020-2030 Brazil Antipsychotic Drug Market Size
Table 2020-2030 Argentina Antipsychotic Drug Market Size
Table 2020-2030 Chile Antipsychotic Drug Market Size
Table 2020-2030 Peru Antipsychotic Drug Market Size
Table 2020-2030 Asia & Pacific Antipsychotic Drug Market Size
Figure 2020-2030 Asia & Pacific Antipsychotic Drug Market Size and CAGR
Table 2020-2030 Asia & Pacific Antipsychotic Drug Market Size by Application
Table 2020-2025 Asia & Pacific Antipsychotic Drug Key Players Revenue
Table 2020-2025 Asia & Pacific Antipsychotic Drug Key Players Market Share
Table 2020-2030 Asia & Pacific Antipsychotic Drug Market Size by Type
Table 2020-2030 China Antipsychotic Drug Market Size
Table 2020-2030 India Antipsychotic Drug Market Size
Table 2020-2030 Japan Antipsychotic Drug Market Size
Table 2020-2030 South Korea Antipsychotic Drug Market Size
Table 2020-2030 Southeast Asia Antipsychotic Drug Market Size
Table 2020-2030 Australia Antipsychotic Drug Market Size
Table 2020-2030 Europe Antipsychotic Drug Market Size
Figure 2020-2030 Europe Antipsychotic Drug Market Size and CAGR
Table 2020-2030 Europe Antipsychotic Drug Market Size by Application
Table 2020-2025 Europe Antipsychotic Drug Key Players Revenue
Table 2020-2025 Europe Antipsychotic Drug Key Players Market Share
Table 2020-2030 Europe Antipsychotic Drug Market Size by Type
Table 2020-2030 Germany Antipsychotic Drug Market Size
Table 2020-2030 France Antipsychotic Drug Market Size
Table 2020-2030 United Kingdom Antipsychotic Drug Market Size
Table 2020-2030 Italy Antipsychotic Drug Market Size
Table 2020-2030 Spain Antipsychotic Drug Market Size
Table 2020-2030 Belgium Antipsychotic Drug Market Size
Table 2020-2030 Netherlands Antipsychotic Drug Market Size
Table 2020-2030 Austria Antipsychotic Drug Market Size
Table 2020-2030 Poland Antipsychotic Drug Market Size
Table 2020-2030 Russia Antipsychotic Drug Market Size
Table 2020-2030 MEA Antipsychotic Drug Market Size
Figure 2020-2030 MEA Antipsychotic Drug Market Size and CAGR
Table 2020-2030 MEA Antipsychotic Drug Market Size by Application
Table 2020-2025 MEA Antipsychotic Drug Key Players Revenue
Table 2020-2025 MEA Antipsychotic Drug Key Players Market Share

Table 2020-2030 MEA Antipsychotic Drug Market Size by Type
Table 2020-2030 Egypt Antipsychotic Drug Market Size
Table 2020-2030 Israel Antipsychotic Drug Market Size
Table 2020-2030 South Africa Antipsychotic Drug Market Size
Table 2020-2030 Gulf Cooperation Council Countries Antipsychotic Drug Market Size
Table 2020-2030 Turkey Antipsychotic Drug Market Size
Table 2020-2025 Global Antipsychotic Drug Market Size by Region
Table 2020-2025 Global Antipsychotic Drug Market Size Share by Region
Table 2020-2025 Global Antipsychotic Drug Market Size by Application
Table 2020-2025 Global Antipsychotic Drug Market Share by Application
Table 2020-2025 Global Antipsychotic Drug Key Vendors Revenue
Figure 2020-2025 Global Antipsychotic Drug Market Size and Growth Rate
Table 2020-2025 Global Antipsychotic Drug Key Vendors Market Share
Table 2020-2025 Global Antipsychotic Drug Market Size by Type
Table 2020-2025 Global Antipsychotic Drug Market Share by Type
Table 2025-2030 Global Antipsychotic Drug Market Size by Region
Table 2025-2030 Global Antipsychotic Drug Market Size Share by Region
Table 2025-2030 Global Antipsychotic Drug Market Size by Application
Table 2025-2030 Global Antipsychotic Drug Market Share by Application
Table 2025-2030 Global Antipsychotic Drug Key Vendors Revenue
Figure 2025-2030 Global Antipsychotic Drug Market Size and Growth Rate
Table 2025-2030 Global Antipsychotic Drug Key Vendors Market Share
Table 2025-2030 Global Antipsychotic Drug Market Size by Type
Table 2025-2030 Antipsychotic Drug Global Market Share by Type

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