

Insomnia Therapeutics Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type

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Abstracts

Insomnia Therapeutics Market Summary

Introduction and Market Overview

Insomnia therapeutics, including benzodiazepines, nonbenzodiazepines, orexin antagonists, and melatonin antagonists, address a prevalent sleep disorder affecting 10-30% of the global population, with chronic insomnia at 5-10%. The market is driven by rising anxiety and depression, with a 25% increase in cases post-COVID-19, and high prevalence in women and the elderly (20-40%). Orexin antagonists like suvorexant and daridorexant, with low dependency, reduce sleep onset by 30 minutes and improve maintenance by 60%. The aging population (1 billion over 60 in 2020, projected to reach 2.1 billion by 2050), health education, and 60% reimbursement coverage in OECD countries boost demand. The global insomnia therapeutics market is estimated at USD 1.5-3.0 billion in 2025, with a CAGR of 3%-7% through 2030.

Regional Market Trends

North America: The U.S. leads with high insomnia diagnoses and orexin antagonist adoption, while Canada focuses on sleep clinics.

Europe: Germany, France, and the UK drive growth with robust mental health services.

Asia Pacific: China and India see rising demand due to urban stress, with Japan emphasizing novel therapies.

Rest of the World: Brazil expands access to generics, while the Middle East addresses sleep health.

Application Analysis

Prescription: Expected growth of 3.5%-7.5%, driven by chronic insomnia. Trends focus on low-dependency drugs.

Over-the-Counter (OTC): Projected growth of 3.0%-7.0%, linked to mild cases. Advances emphasize natural supplements.

Type Analysis

Benzodiazepines: Expected growth of 2.5%-6.5%, used for short-term relief. Trends focus on limited use due to dependency.

Nonbenzodiazepines: Projected growth of 3.2%-7.2%, favored for safety. Advances emphasize short-acting agents.

Antidepressants: Anticipated growth of 2.8%-6.8%, suited for comorbid insomnia. Trends highlight low-dose options.

Orexin Antagonists: Expected growth of 4.0%-8.0%, valued for low dependency. Developments prioritize long-term efficacy.

Melatonin Antagonists: Expected growth of 3.5%-7.5%, used for sleep regulation. Trends focus on OTC formulations.

Others: Expected growth of 2.5%-6.5%, covering novel therapies. Trends highlight non-drug options.

Key Market Players

Merck: Offers suvorexant for insomnia.

Sanofi: Provides nonbenzodiazepine therapies.

Takeda Pharmaceutical: Develops sleep disorder treatments.

Pfizer: Supplies antidepressants for insomnia.

Idorsia: Specializes in daridorexant formulations.

Porter's Five Forces Analysis

Threat of New Entrants: Moderate, due to high R&D costs, but OTC supplements lower barriers.

Threat of Substitutes: High, with non-drug therapies like CBT-I competing, but drugs are primary for severe cases.

Bargaining Power of Buyers: High, as generics and OTC options increase price competition.

Bargaining Power of Suppliers: Low, with multiple API providers.

Competitive Rivalry: High, with players competing on efficacy and safety.

Market Opportunities and Challenges

Opportunities:

Addressing insomnia, affecting 10-30% of the population.

Leveraging orexin antagonists, improving sleep maintenance by 60%.

Managing anxiety and depression, with 25% case increase post-COVID-19.

Supporting an aging population, with 20-40% insomnia prevalence.

Utilizing 60% reimbursement coverage in OECD countries.

Expanding health education, increasing diagnosis rates to 50%.

Challenges:

High costs of novel therapies like orexin antagonists.

Regulatory scrutiny on dependency risks.

Competition from non-drug therapies like CBT-I.

Patient adherence issues with long-term treatments.

Limited access in low-income regions.

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 Insomnia Therapeutics 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 INSOMNIA THERAPEUTICS MARKET IN NORTH AMERICA (2020-2030)

- 8.1 Insomnia Therapeutics Market Size
- 8.2 Insomnia Therapeutics Market by End Use
- 8.3 Competition by Players/Suppliers
- 8.4 Insomnia Therapeutics 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 INSOMNIA THERAPEUTICS MARKET IN SOUTH AMERICA (2020-2030)

- 9.1 Insomnia Therapeutics Market Size
- 9.2 Insomnia Therapeutics Market by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Insomnia Therapeutics 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 INSOMNIA THERAPEUTICS MARKET IN ASIA & PACIFIC (2020-2030)

- 10.1 Insomnia Therapeutics Market Size
- 10.2 Insomnia Therapeutics Market by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Insomnia Therapeutics 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 INSOMNIA THERAPEUTICS MARKET IN EUROPE (2020-2030)

- 11.1 Insomnia Therapeutics Market Size
- 11.2 Insomnia Therapeutics Market by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Insomnia Therapeutics 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 INSOMNIA THERAPEUTICS MARKET IN MEA (2020-2030)

- 12.1 Insomnia Therapeutics Market Size
- 12.2 Insomnia Therapeutics Market by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Insomnia Therapeutics 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 INSOMNIA THERAPEUTICS MARKET (2020-2025)

- 13.1 Insomnia Therapeutics Market Size
- 13.2 Insomnia Therapeutics Market by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Insomnia Therapeutics Market Size by Type

CHAPTER 14 GLOBAL INSOMNIA THERAPEUTICS MARKET FORECAST (2025-2030)

- 14.1 Insomnia Therapeutics Market Size Forecast
- 14.2 Insomnia Therapeutics Application Forecast
- 14.3 Competition by Players/Suppliers
- 14.4 Insomnia Therapeutics Type Forecast

CHAPTER 15 ANALYSIS OF GLOBAL KEY VENDORS

- 15.1 Merck
 - 15.1.1 Company Profile
 - 15.1.2 Main Business and Insomnia Therapeutics Information
 - 15.1.3 SWOT Analysis of Merck
 - 15.1.4 Merck Insomnia Therapeutics Revenue, Gross Margin and Market Share (2020-2025)
- 15.2 Sanofi
 - 15.2.1 Company Profile
 - 15.2.2 Main Business and Insomnia Therapeutics Information
 - 15.2.3 SWOT Analysis of Sanofi
 - 15.2.4 Sanofi Insomnia Therapeutics Revenue, Gross Margin and Market Share (2020-2025)
- 15.3 Takeda Pharmaceutical
 - 15.3.1 Company Profile
 - 15.3.2 Main Business and Insomnia Therapeutics Information
 - 15.3.3 SWOT Analysis of Takeda Pharmaceutical
 - 15.3.4 Takeda Pharmaceutical Insomnia Therapeutics Revenue, Gross Margin and Market Share (2020-2025)
- 15.4 Pfizer
 - 15.4.1 Company Profile
 - 15.4.2 Main Business and Insomnia Therapeutics Information
 - 15.4.3 SWOT Analysis of Pfizer
 - 15.4.4 Pfizer Insomnia Therapeutics Revenue, Gross Margin and Market Share

(2020-2025)

15.5 Vanda Pharmaceuticals

15.5.1 Company Profile

15.5.2 Main Business and Insomnia Therapeutics Information

15.5.3 SWOT Analysis of Vanda Pharmaceuticals

15.5.4 Vanda Pharmaceuticals Insomnia Therapeutics Revenue, Gross Margin and Market Share (2020-2025)

15.6 Teva Pharmaceutical

15.6.1 Company Profile

15.6.2 Main Business and Insomnia Therapeutics Information

15.6.3 SWOT Analysis of Teva Pharmaceutical

15.6.4 Teva Pharmaceutical Insomnia Therapeutics Revenue, Gross Margin and Market Share (2020-2025)

15.7 Viatris

15.7.1 Company Profile

15.7.2 Main Business and Insomnia Therapeutics Information

15.7.3 SWOT Analysis of Viatris

15.7.4 Viatris Insomnia Therapeutics Revenue, Gross Margin and Market Share (2020-2025)

Please ask for sample pages for full companies list

Tables and Figures

Table Abbreviation and Acronyms

Table Research Scope of Insomnia Therapeutics Report

Table Data Sources of Insomnia Therapeutics Report

Table Major Assumptions of Insomnia Therapeutics Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure Insomnia Therapeutics Picture

Table Insomnia Therapeutics Classification

Table Insomnia Therapeutics Applications

Table Drivers of Insomnia Therapeutics Market

Table Restraints of Insomnia Therapeutics Market

Table Opportunities of Insomnia Therapeutics Market

Table Threats of Insomnia Therapeutics Market

Table Covid-19 Impact For Insomnia Therapeutics Market

Table Raw Materials Suppliers

Table Different Production Methods of Insomnia Therapeutics

Table Cost Structure Analysis of Insomnia Therapeutics

Table Key End Users

Table Latest News of Insomnia Therapeutics Market
Table Merger and Acquisition
Table Planned/Future Project of Insomnia Therapeutics Market
Table Policy of Insomnia Therapeutics Market
Table 2020-2030 North America Insomnia Therapeutics Market Size
Figure 2020-2030 North America Insomnia Therapeutics Market Size and CAGR
Table 2020-2030 North America Insomnia Therapeutics Market Size by Application
Table 2020-2025 North America Insomnia Therapeutics Key Players Revenue
Table 2020-2025 North America Insomnia Therapeutics Key Players Market Share
Table 2020-2030 North America Insomnia Therapeutics Market Size by Type
Table 2020-2030 United States Insomnia Therapeutics Market Size
Table 2020-2030 Canada Insomnia Therapeutics Market Size
Table 2020-2030 Mexico Insomnia Therapeutics Market Size
Table 2020-2030 South America Insomnia Therapeutics Market Size
Figure 2020-2030 South America Insomnia Therapeutics Market Size and CAGR
Table 2020-2030 South America Insomnia Therapeutics Market Size by Application
Table 2020-2025 South America Insomnia Therapeutics Key Players Revenue
Table 2020-2025 South America Insomnia Therapeutics Key Players Market Share
Table 2020-2030 South America Insomnia Therapeutics Market Size by Type
Table 2020-2030 Brazil Insomnia Therapeutics Market Size
Table 2020-2030 Argentina Insomnia Therapeutics Market Size
Table 2020-2030 Chile Insomnia Therapeutics Market Size
Table 2020-2030 Peru Insomnia Therapeutics Market Size
Table 2020-2030 Asia & Pacific Insomnia Therapeutics Market Size
Figure 2020-2030 Asia & Pacific Insomnia Therapeutics Market Size and CAGR
Table 2020-2030 Asia & Pacific Insomnia Therapeutics Market Size by Application
Table 2020-2025 Asia & Pacific Insomnia Therapeutics Key Players Revenue
Table 2020-2025 Asia & Pacific Insomnia Therapeutics Key Players Market Share
Table 2020-2030 Asia & Pacific Insomnia Therapeutics Market Size by Type
Table 2020-2030 China Insomnia Therapeutics Market Size
Table 2020-2030 India Insomnia Therapeutics Market Size
Table 2020-2030 Japan Insomnia Therapeutics Market Size
Table 2020-2030 South Korea Insomnia Therapeutics Market Size
Table 2020-2030 Southeast Asia Insomnia Therapeutics Market Size
Table 2020-2030 Australia Insomnia Therapeutics Market Size
Table 2020-2030 Europe Insomnia Therapeutics Market Size
Figure 2020-2030 Europe Insomnia Therapeutics Market Size and CAGR
Table 2020-2030 Europe Insomnia Therapeutics Market Size by Application
Table 2020-2025 Europe Insomnia Therapeutics Key Players Revenue

Table 2020-2025 Europe Insomnia Therapeutics Key Players Market Share
Table 2020-2030 Europe Insomnia Therapeutics Market Size by Type
Table 2020-2030 Germany Insomnia Therapeutics Market Size
Table 2020-2030 France Insomnia Therapeutics Market Size
Table 2020-2030 United Kingdom Insomnia Therapeutics Market Size
Table 2020-2030 Italy Insomnia Therapeutics Market Size
Table 2020-2030 Spain Insomnia Therapeutics Market Size
Table 2020-2030 Belgium Insomnia Therapeutics Market Size
Table 2020-2030 Netherlands Insomnia Therapeutics Market Size
Table 2020-2030 Austria Insomnia Therapeutics Market Size
Table 2020-2030 Poland Insomnia Therapeutics Market Size
Table 2020-2030 Russia Insomnia Therapeutics Market Size
Table 2020-2030 MEA Insomnia Therapeutics Market Size
Figure 2020-2030 MEA Insomnia Therapeutics Market Size and CAGR
Table 2020-2030 MEA Insomnia Therapeutics Market Size by Application
Table 2020-2025 MEA Insomnia Therapeutics Key Players Revenue
Table 2020-2025 MEA Insomnia Therapeutics Key Players Market Share
Table 2020-2030 MEA Insomnia Therapeutics Market Size by Type
Table 2020-2030 Egypt Insomnia Therapeutics Market Size
Table 2020-2030 Israel Insomnia Therapeutics Market Size
Table 2020-2030 South Africa Insomnia Therapeutics Market Size
Table 2020-2030 Gulf Cooperation Council Countries Insomnia Therapeutics Market Size
Table 2020-2030 Turkey Insomnia Therapeutics Market Size
Table 2020-2025 Global Insomnia Therapeutics Market Size by Region
Table 2020-2025 Global Insomnia Therapeutics Market Size Share by Region
Table 2020-2025 Global Insomnia Therapeutics Market Size by Application
Table 2020-2025 Global Insomnia Therapeutics Market Share by Application
Table 2020-2025 Global Insomnia Therapeutics Key Vendors Revenue
Figure 2020-2025 Global Insomnia Therapeutics Market Size and Growth Rate
Table 2020-2025 Global Insomnia Therapeutics Key Vendors Market Share
Table 2020-2025 Global Insomnia Therapeutics Market Size by Type
Table 2020-2025 Global Insomnia Therapeutics Market Share by Type
Table 2025-2030 Global Insomnia Therapeutics Market Size by Region
Table 2025-2030 Global Insomnia Therapeutics Market Size Share by Region
Table 2025-2030 Global Insomnia Therapeutics Market Size by Application
Table 2025-2030 Global Insomnia Therapeutics Market Share by Application
Table 2025-2030 Global Insomnia Therapeutics Key Vendors Revenue
Figure 2025-2030 Global Insomnia Therapeutics Market Size and Growth Rate

Table 2025-2030 Global Insomnia Therapeutics Key Vendors Market Share

Table 2025-2030 Global Insomnia Therapeutics Market Size by Type

Table 2025-2030 Insomnia Therapeutics Global Market Share by Type

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