

Orexin Receptor Antagonist Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type

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Abstracts

Orexin Receptor Antagonist Market Summary

The orexin receptor antagonist market represents a specialized and rapidly evolving segment of the central nervous system (CNS) therapeutics field, with strong potential for growth over the coming years. Orexin receptor antagonists are a novel class of drugs designed to regulate sleep–wake cycles by blocking the activity of orexin neuropeptides, which play a central role in maintaining wakefulness. Unlike traditional hypnotics such as benzodiazepines or non-benzodiazepine “Z-drugs,” which broadly suppress neuronal activity, orexin receptor antagonists act more selectively, targeting orexin pathways and thereby reducing the risk of dependence, tolerance, and next-day residual sedation. The market is expected to reach a value of approximately USD 0.8–1.6 billion in 2025, with a projected compound annual growth rate (CAGR) of 6.5–12.5% through 2030. This growth trajectory reflects rising awareness of sleep disorders, the medical need for safer and more effective therapies, and the commercial expansion of approved drugs such as suvorexant, daridorexant, and lemborexant. Additionally, the expanding exploration of orexin antagonists in new indications, such as delirium and neuropsychiatric disorders, adds to the potential of this therapeutic class.

Market Characteristics

Orexin receptor antagonists function by inhibiting orexin A and orexin B neuropeptides at orexin-1 (OX1R) and orexin-2 (OX2R) receptors. The dual orexin receptor antagonists (DORAs) currently approved—suvorexant, daridorexant, and

lemborexant—are primarily indicated for insomnia. Clinical evidence suggests that they improve both sleep onset and sleep maintenance with fewer adverse effects compared to older sleep medications.

Beyond insomnia, research is expanding into delirium and other disorders where dysregulated orexin signaling is implicated. Clinical studies indicate potential benefits in managing agitation, circadian rhythm disturbances, and cognitive decline, opening new pathways for market expansion. The selective and mechanism-based nature of orexin antagonists underpins their long-term promise within CNS therapeutics.

Key features of the market include:

High R&D intensity, with focus on both safety differentiation and expanded indications.

Patent protection as a major driver, shaping the competitive landscape.

Prescription-driven market, with physician adoption and payer reimbursement policies central to growth.

Emerging awareness and diagnosis of insomnia, particularly in aging populations, fueling demand.

Regional Market Trends

North America

North America, led by the United States, is the largest market for orexin receptor antagonists. The region benefits from high diagnosis rates of insomnia, strong healthcare infrastructure, and high willingness to adopt innovative CNS therapies. Patent-protected drugs such as Merck's Belsomra and Eisai's Dayvigo have established significant presence in the U.S. The introduction of Idorsia's Quviviq adds further momentum, supported by strategic marketing and payer engagement. Growth in this region is expected in the range of 6–9% CAGR, with expansion into delirium and other indications potentially pushing growth higher.

Europe

Europe is experiencing increasing adoption of orexin antagonists, though reimbursement policies and physician prescribing behaviors vary across countries. The uptake of Quviviq has been notable, with Idorsia leveraging its European base to expand access. However, price sensitivity and stricter reimbursement environments compared with the U.S. may moderate growth. The region is projected to grow at 5.5–8.5% CAGR, with opportunities concentrated in Western Europe.

Asia-Pacific

Asia-Pacific presents substantial growth opportunities due to large populations, rising awareness of sleep health, and growing prevalence of insomnia linked to urban lifestyles and aging demographics. Japan has been an early adopter of orexin antagonists, with Belsomra and Dayvigo achieving significant traction. China represents a promising market, with rising healthcare expenditure and a growing middle class fueling demand for advanced sleep disorder treatments. The Asia-Pacific region is projected to grow at 8–12% CAGR, the fastest among all regions, supported by both expanding diagnoses and broader access to innovative CNS drugs.

Latin America

Latin America remains an emerging market for orexin receptor antagonists, constrained by affordability, limited awareness, and regulatory variability. However, with urbanization and stress-related disorders on the rise, demand is expected to gradually increase. Brazil and Mexico are likely to lead uptake, with a CAGR projection in the range of 5–7% through 2030.

Middle East & Africa (MEA)

MEA markets are still in nascent stages for insomnia treatment with novel therapeutics. Limited diagnosis rates, competing healthcare priorities, and affordability barriers restrict adoption. Nonetheless, certain affluent countries in the Gulf Cooperation Council (GCC) are expected to demonstrate faster uptake as awareness grows. The region is expected to grow at 5–7.5% CAGR, albeit from a low base.

Market Segmentation by Application

Insomnia:

The primary driver of the orexin receptor antagonist market, insomnia affects millions worldwide and has a significant impact on quality of life, productivity, and long-term health. Orexin antagonists are positioned as next-generation therapies offering differentiated safety and efficacy profiles compared to traditional hypnotics. Demand in this segment is expected to grow steadily as awareness and diagnosis increase globally.

Delirium:

Though not yet a primary commercial driver, delirium represents an emerging application area. Clinical studies suggest that orexin antagonists may help manage sleep-wake disturbances and agitation in delirium, especially in elderly patients and those in intensive care units. If approved, this application could broaden the market significantly, creating opportunities for expansion beyond insomnia.

Market Segmentation by Type

Suvorexant (Merck & Co., marketed as Belsomra):

Approved in multiple markets for insomnia, Belsomra generated USD 0.2–0.3 billion in revenue in 2024. Its U.S. patent is set to expire in 2029, with Japanese protection until 2031. As the first-in-class drug, it has strong brand recognition but faces competition from newer entrants.

Daridorexant (Idorsia Pharmaceuticals, marketed as Quviviq):

Launched more recently, Quviviq generated USD 0.1–0.2 billion in 2024. Idorsia has positioned daridorexant with claims of improved next-day functioning and targeted marketing strategies, particularly in Europe and North America. As a newer entrant, it

holds strong potential for growth as awareness increases.

Lemborexant (Eisai, marketed as Dayvigo):

Dayvigo achieved revenues of USD 0.3–0.4 billion in 2024, with strong adoption in Japan and the U.S. Eisai's strategy emphasizes differentiation in safety and next-morning performance, appealing particularly to elderly patients.

These three drugs form the backbone of the market, with ongoing efforts to expand indications, geographic reach, and market penetration.

Key Market Players

Merck & Co.:

A global pharmaceutical leader with a diverse portfolio, Merck pioneered the orexin receptor antagonist space with Belsomra. Despite approaching patent expirations in key markets, Merck remains a central player, leveraging its extensive commercial infrastructure.

Idorsia Pharmaceuticals Ltd:

A Swiss-based biopharmaceutical company specializing in novel therapies, Idorsia has invested heavily in positioning Quviviq as a differentiated alternative in the insomnia market. Its agile strategy and European presence provide competitive advantages, though it faces challenges in scaling revenue to match larger incumbents.

Eisai Inc.:

Headquartered in Japan, Eisai markets Dayvigo and has achieved significant penetration in Asia-Pacific markets. Eisai emphasizes its expertise in neurology and oncology, and its global distribution network supports further expansion.

Value Chain and Industry Structure

The orexin receptor antagonist value chain encompasses multiple stages:

1. Research & Development:

High investment in neuroscience R&D, requiring deep expertise in sleep medicine and orexin signaling pathways. Clinical differentiation (e.g., safety, functional outcomes) is essential.

2. Regulatory Approval:

Strict clinical trial requirements, particularly focused on safety and next-day cognitive effects, create significant barriers to entry.

3. Manufacturing:

Production is less complex than biologics but requires compliance with GMP standards and consistent quality.

4. Distribution & Marketing:

Strong physician education and direct-to-consumer marketing (particularly in the U.S.) are vital to adoption, as many patients are unfamiliar with orexin antagonists compared to older hypnotics.

5. Prescription & Reimbursement:

Payer coverage and inclusion in treatment guidelines are key to scaling market penetration. Insurers' decisions on reimbursement directly influence patient access.

Opportunities and Challenges

Opportunities:

Rising prevalence of insomnia globally, particularly in aging populations and urbanized societies.

Differentiation from older hypnotics, offering improved safety and reduced risk of dependence.

Expansion into new indications such as delirium, agitation, and potentially neurodegenerative conditions.

Rapid growth potential in Asia-Pacific, with Japan and China leading adoption.

Strong intellectual property protection in place for newer agents, enabling sustained revenue opportunities.

Challenges:

High competition from generic hypnotics and entrenched prescribing habits among physicians.

Patent expirations will increase pricing pressure, particularly for Belsomra.

Limited public awareness of orexin receptor antagonists, requiring significant education and marketing.

Reimbursement hurdles in Europe and emerging markets, where payers are cautious about higher-cost therapies.

Regulatory demands for demonstrating long-term safety and absence of cognitive impairment or next-morning residual effects.

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