

# **Dravet Syndrome Market Forecasts to 2032 – Global Analysis By Drug Type (Antiepileptic Drugs [AEDs], Cannabidiol-Based Drugs, Serotonin Modulators and Gene Therapy & Emerging Treatments), Treatment Type (Symptomatic Treatment, Ketogenic Diet and Vagus Nerve Stimulation [VNS]), Seizure Type, Distribution Channel and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Dravet Syndrome Market is accounted for \$435.7 million in 2025 and is expected to reach \$761.5 million by 2032 growing at a CAGR of 8.3% during the forecast period. Dravet Syndrome is a rare, severe form of epilepsy that begins in infancy, characterized by prolonged seizures, developmental delays, and cognitive impairment. The market addresses diagnosis, treatment, and management of this condition through pharmaceuticals, genetic testing, and supportive therapies. Rising awareness of rare diseases, advancements in precision medicine, and orphan drug designations are fueling research and treatment innovation. Emerging therapies, including cannabidiol-based drugs and gene-targeted solutions, are creating new opportunities.

Market Dynamics:

Driver:

Increasing awareness of rare diseases

Initiatives from patient advocacy groups and improved physician education campaigns are enhancing early and accurate diagnosis rates. This heightened recognition is crucial

for market expansion, as it directly increases the diagnosed prevalent pool, thereby driving demand for approved therapeutics and supportive care products. Furthermore, regulatory incentives like orphan drug designation stimulate pharmaceutical investment in this niche, ensuring a more robust pipeline. This collective effort translates into greater market penetration and revenue generation for existing and forthcoming treatments.

#### Restraint:

##### Limited patient population

The primary market restraint for Dravet syndrome is its exceedingly limited patient population, as it is a rare disease with an incidence of approximately 1 in 15,700 live births. This small and fragmented addressable patient pool inherently caps the potential revenue ceiling for any launched therapy, discouraging broad investment from large pharmaceutical entities. The economics of drug development, including high R&D costs, are challenging to recoup without premium pricing strategies, which in turn face intense scrutiny from payers. This limitation fundamentally restricts the overall market size and commercial attractiveness compared to more prevalent indications.

#### Opportunity:

##### Growth in cannabidiol-based therapies

Significant market opportunity lies in the expansion of cannabidiol (CBD)-based therapies, which have demonstrated substantial efficacy in reducing seizure frequency in treatment-resistant Dravet syndrome patients. The success of approved drugs like Epidiolex® has validated this therapeutic class, paving the way for next-generation cannabinoid candidates and combination therapies. This growing acceptance creates fertile ground for clinical innovation and market expansion. Additionally, the favorable regulatory environment for orphan drugs accelerates the development pathway, offering companies a viable route to capture value in a space with high unmet need.

#### Threat:

##### Risk of therapy side effects

Many antiepileptic drugs and CBD-based treatments carry black box warnings for severe side effects, such as hepatotoxicity or suicidal ideation. These safety concerns

can lead to stringent regulatory mandates, including rigorous REMS programs, which can impede patient access and dampen prescribing rates. Moreover, the emergence of significant safety data post-marketing can trigger label restrictions or even product withdrawals, eroding investor confidence and destabilizing the commercial viability of key market products.

#### Covid-19 Impact:

The COVID-19 pandemic initially disrupted the Dravet syndrome market through delayed clinical trials, hindering drug development pipelines. Supply chain interruptions also posed challenges for drug availability. Conversely, the crisis accelerated the adoption of telehealth, improving continuity of care for vulnerable patients avoiding in-person visits. Furthermore, regulatory flexibility ensured that clinical programs could adapt, mitigating long-term setbacks. The market demonstrated resilience, with established therapies maintaining stable demand due to the chronic nature of the condition, leading to a relatively swift recovery to pre-pandemic growth trajectories.

The antiepileptic drugs (AEDs) segment is expected to be the largest during the forecast period

The antiepileptic drugs (AEDs) segment is expected to account for the largest market share during the forecast period due to its established role as the first-line standard of care for managing Dravet syndrome seizures. This segment encompasses a broad range of medications, including valproate, clobazam, and stiripentol, which are routinely used in polytherapy regimens. Their deep-rooted presence in treatment guidelines, widespread physician familiarity, and extensive insurance formularies ensure consistent and dominant usage. Moreover, the continued development of novel AEDs with improved safety profiles further solidifies this segment's foundational position and revenue dominance within the treatment landscape.

The ketogenic diet segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the ketogenic diet segment is predicted to witness the highest growth rate, driven by growing clinical evidence supporting its efficacy as an adjunctive therapy for drug-resistant seizures. This high-fat, low-carbohydrate diet induces a metabolic state of ketosis, which is proven to significantly reduce seizure frequency. Increasing physician recommendations and the emergence of modified, more palatable diet versions are improving patient adherence and adoption rates. Additionally, the non-

pharmacological nature of this intervention appeals to caregivers seeking alternatives with different side effect profiles, fueling its rapid growth within the management paradigm.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, attributable to its advanced healthcare infrastructure, high diagnostic capabilities, and favorable reimbursement policies for expensive orphan drugs. The presence of key market players, coupled with strong advocacy groups that drive awareness and early intervention, significantly contributes to this leadership. Moreover, the region's regulatory framework, through the FDA's orphan drug and fast-track designations, actively encourages the development and rapid commercialization of novel therapies, ensuring prompt patient access and sustaining the region's position as the largest revenue-generating market.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, fueled by improving healthcare access, rising medical awareness about rare neurological disorders, and increasing healthcare expenditure in emerging economies. Governments are gradually implementing policies to support rare disease patients, which are expected to improve diagnosis rates and treatment adoption. Furthermore, the expanding presence of global pharmaceutical companies conducting clinical trials and seeking market authorization in this underserved region presents significant growth potential.

Key players in the market

Some of the key players in Dravet Syndrome Market include Biocodex, Biogen, Bright Minds Bio, Encoded Therapeutics, Epygenix Therapeutics, Harmony Biosciences, Jazz Pharmaceuticals, Lundbeck, Marinus Pharmaceuticals, Meiji Seika Pharma, Novartis, Ovid Therapeutics, Pfizer, Praxis Precision Medicines, Stoke Therapeutics, Supernus Pharmaceuticals, Takeda Pharmaceutical Company, UCB, and Xenon Pharmaceuticals.

Key Developments:

In June 2025, UCB, a global biopharmaceutical company, today announced that the

phase 3 study investigating the safety and efficacy of adjunctive fenfluramine in CDKL5 Deficiency Disorder (CDD) met its primary and key secondary endpoints.<sup>1</sup> The study is a randomized, double-blind, placebo-controlled, fixed-dose, multi-center study examining the efficacy, safety, and pharmacokinetics of adjunctive fenfluramine treatment in 87 children and adults aged 1 – 35, with a CDD diagnosis and uncontrolled seizures.<sup>2</sup>

In February 2025, Stoke Therapeutics Inc. and Biogen Inc. said Tuesday they are entering a collaboration to develop and commercialize a treatment for Dravet syndrome, a severe form of epilepsy that starts in childhood.

#### Drug Types Covered:

Antiepileptic Drugs (AEDs)

Cannabidiol-Based Drugs

Serotonin Modulators

Gene Therapy & Emerging Treatments

#### Treatment Types:

Symptomatic Treatment

Ketogenic Diet

Vagus Nerve Stimulation (VNS)

#### Seizure Types Covered:

Myoclonic Seizures

Atonic Seizures

Partial Seizures

Tonic-Clonic Seizures

Other Seizure Types

End Users Covered:

Hospital Pharmacies

Retail Pharmacies

Online Pharmacies

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

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What our report offers:

*Dravet Syndrome Market Forecasts to 2032 – Global Analysis By Drug Type (Antiepileptic Drugs [AEDs], Cannabidi...*

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

### **Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

#### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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