

Prader-Willi Syndrome Therapeutics Market Size, Share and Growth Outlook 2026: By Treatment Type (Growth Hormone Therapy, Hyperphagia Treatment, Others), By Route of Administration, By End-User, Companies to 2034.

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Abstracts

The global Prader-Willi Syndrome Therapeutics Market size is forecast to increase from \$765.04 Million in 2026 to \$2005.2 Million in 2034 at a CAGR of 12.8% between 2026 and 2034.

The Prader-Willi Syndrome Therapeutics market report provides detailed analysis and outlook of Prader-Willi Syndrome Therapeutics segments including By Treatment Type (Growth Hormone Therapy, Hyperphagia Treatment, Others), By Route of Administration (Oral, Injectable), By End-User (Hospitals, Clinics, Others) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Prader-Willi Syndrome (PWS) Therapeutics Industry Overview

Targeted Neuroendocrine Therapies and Symptom-Specific Treatments Are Advancing PWS Drug Development

The Prader-Willi syndrome therapeutics industry is entering a new phase of clinical development driven by increasing understanding of the complex neuroendocrine mechanisms underlying hyperphagia, metabolic dysfunction, behavioral abnormalities, and sleep disturbances associated with the disorder. Pharmaceutical companies are increasingly pursuing targeted therapies that address specific pathophysiological

pathways rather than relying solely on supportive care and symptom management approaches. Advances in melanocortin signaling modulation, neuroendocrine regulation, and central nervous system therapeutics are expanding treatment possibilities for this rare genetic disorder. These developments are strengthening the therapeutic pipeline and creating opportunities for disease-specific interventions capable of addressing multiple clinical manifestations of Prader-Willi syndrome.

Hyperphagia-Focused Therapies Continue to Demonstrate Clinical Progress

One of the most significant areas of innovation within the Prader-Willi syndrome market involves therapies targeting hyperphagia, which remains one of the most debilitating features of the disease. Supporting this trend, Rhythm Pharmaceuticals reported encouraging Phase II clinical data for setmelanotide, demonstrating improvements in hyperphagia alongside reductions in fat mass among patients with Prader-Willi syndrome. These findings further validate melanocortin-4 receptor agonism as a promising therapeutic strategy for addressing the metabolic and behavioral manifestations of the disorder. Similarly, long-term treatment durability continues to emerge as a critical clinical endpoint as developers seek therapies capable of providing sustained improvements in patient quality of life.

Long-Term Neuroendocrine and Behavioral Therapies Expand Treatment Opportunities

The therapeutic landscape is also broadening to include treatments targeting behavioral symptoms, sleep disturbances, and broader neuroendocrine dysfunction. Soleno Therapeutics, operating within the Neurocrine Biosciences portfolio, presented long-term clinical findings demonstrating sustained improvements in hyperphagia and behavioral outcomes with VYKAT® XR (diazoxide choline) in Prader-Willi syndrome patients. Meanwhile, Harmony Biosciences Holdings, Inc. advanced its Phase III clinical program evaluating pitolisant for excessive daytime sleepiness and behavioral abnormalities associated with Prader-Willi syndrome. These clinical development efforts reflect the industry's broader strategy of targeting multiple symptom domains simultaneously, with the goal of delivering more comprehensive and durable therapeutic benefits for patients affected by this complex rare disease.

Prader-Willi Syndrome Therapeutics Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Prader-Willi Syndrome Therapeutics market is witnessing increasing

investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Soleno Therapeutics, Inc., Harmony Biosciences, LLC, Pfizer Inc., Novo Nordisk A/S, Sandoz Group AG, Acadia Pharmaceuticals Inc., Neuren Pharmaceuticals Limited, Aardvark Therapeutics, Inc., Jazz Pharmaceuticals plc, Gedeon Richter Plc. The Prader-Willi Syndrome Therapeutics market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Prader-Willi Syndrome Therapeutics industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

Growth Prader-Willi Syndrome Therapeutics Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

Market Trends, Drivers, Potential Opportunities, and Challenges faced by Prader-Willi Syndrome Therapeutics companies

Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

Detailed SWOT Analysis of global and regional Prader-Willi Syndrome Therapeutics markets

Competitive analysis including business description, product analysis, and financial profiles

Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Prader-Willi Syndrome Therapeutics Market Competitive Benchmarking and Company

Analysis

Leading companies in Prader-Willi Syndrome Therapeutics industry include- Soleno Therapeutics, Inc., Harmony Biosciences, LLC, Pfizer Inc., Novo Nordisk A/S, Sandoz Group AG, Acadia Pharmaceuticals Inc., Neuren Pharmaceuticals Limited, Aardvark Therapeutics, Inc., Jazz Pharmaceuticals plc, Gedeon Richter Plc. The Prader-Willi Syndrome Therapeutics market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Prader-Willi Syndrome Therapeutics Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Prader-Willi Syndrome Therapeutics market remains one of the strongest-performing segments in the country.

The US Prader-Willi Syndrome Therapeutics Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Prader-Willi Syndrome Therapeutics market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Prader-Willi Syndrome Therapeutics industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Prader-Willi Syndrome Therapeutics markets

Canada's strong Prader-Willi Syndrome Therapeutics sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Prader-Willi Syndrome Therapeutics market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Prader-Willi Syndrome Therapeutics Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Prader-Willi Syndrome Therapeutics market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Prader-Willi Syndrome Therapeutics population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Prader-Willi Syndrome Therapeutics industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Prader-Willi Syndrome Therapeutics market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Prader-Willi Syndrome Therapeutics sales through 2034

France Prader-Willi Syndrome Therapeutics companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch

spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Prader-Willi Syndrome Therapeutics Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Prader-Willi Syndrome Therapeutics distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Prader-Willi Syndrome Therapeutics Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Prader-Willi Syndrome Therapeutics market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Prader-Willi Syndrome Therapeutics industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Prader-Willi Syndrome Therapeutics industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure

will remain intense in drugs and consumables because reimbursement.

India Prader-Willi Syndrome Therapeutics Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Prader-Willi Syndrome Therapeutics market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Prader-Willi Syndrome Therapeutics market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Prader-Willi Syndrome Therapeutics Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Prader-Willi Syndrome Therapeutics Market Segmentation

By Treatment Type

Growth Hormone Therapy

Hyperphagia Treatment

Others

By Route of Administration

Oral

Injectable

By End-User

Hospitals

Clinics

Others

Leading Companies in Prader-Willi Syndrome Therapeutics Industry (2026)

Soleno Therapeutics, Inc.

Harmony Biosciences, LLC

Pfizer Inc.

Novo Nordisk A/S

Sandoz Group AG

Acadia Pharmaceuticals Inc.

Neuren Pharmaceuticals Limited

Aardvark Therapeutics, Inc.

Jazz Pharmaceuticals plc

Gedeon Richter Plc

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia, Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa, Other Africa

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Novo Nordisk A/S

Sandoz Group AG

Acadia Pharmaceuticals Inc.

Neuren Pharmaceuticals Limited

Aardvark Therapeutics, Inc.

Jazz Pharmaceuticals plc

Gedeon Richter Plc

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