

Migraine Market Report 2034: Epidemiology Data, Pipeline Therapies, Latest FDA, EMA, PDMA Approvals by DelveInsight

Migraine companies are Impel NeuroPharma, Zosano Pharma, Axsome Therapeutics, Aeon Biopharma, Ionis Pharmaceuticals, Inc., Charleston Laboratories, and others.

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DelveInsight's "Migraine Market Insights, Epidemiology, and Market Forecast-2034" report offers an in-depth understanding of the Migraine, historical and forecasted epidemiology as well as the Migraine market trends in the United States, EU4 (Germany, Spain, Italy, France) the United Kingdom and Japan.



To Know in detail about the Migraine market outlook, drug uptake, treatment scenario and epidemiology trends, Click here; [Migraine Market Forecast](#)

Some of the key facts of the Migraine Market Report:

The Migraine market size is anticipated to grow with a significant CAGR during the study period (2020-2034).

The total Migraine market size in the 7MM was approximately USD 10,880 million in 2023 and is projected to increase during the forecast period (2024-2034).

In 2023, the market size of Migraine was highest in the US among the 7MM accounting for approximately USD 6,790 million that is further expected to increase by 2034.

Migraine prevalence is expected to rise, driven by factors including heightened awareness, lifestyle changes, environmental influences, genetic predisposition, an aging population, hormonal fluctuations, technological advancements, and psychological stressors. Addressing this trend requires multifaceted strategies across healthcare, research, and public policy domains.

In 2023, the US accounted for the maximum patient share of Migraine in the 7MM, i.e., 39%, followed by Japan accounting for around 14% of the total 7MM cases. Among the European

countries, a higher number of cases were in the UK accounting for about 11% of the total 7MM cases.

Key Migraine Companies: Lundbeck Seattle BioPharmaceutical, Eli Lilly and Company, Amgen, Novartis, Teva Pharmaceuticals, Allergan, Biohaven Pharmaceuticals, Dr. Reddy's Labs, AbbVie, Impel NeuroPharma, Zosano Pharma, Axsome Therapeutics, Aeon Biopharma Inc., Ionis Pharmaceuticals, Inc., Charleston Laboratories, and others

Key Migraine Therapies: EMGALITY (Galcanezumab-gnlm), AJOVY (fremanezumab-vfrm), AXS-07, and others

The Migraine epidemiology based on gender analyzed that Males are slightly more affected in the case of Migraine

The Migraine market is expected to surge due to the disease's increasing prevalence and awareness during the forecast period. Furthermore, launching various multiple-stage Migraine pipeline products will significantly revolutionize the Migraine market dynamics.

Migraine Overview

Migraine is a complex neurological condition that manifests in various forms, such as migraine without aura, migraine with aura, and chronic migraine. Symptoms typically include a pulsating headache, nausea, vomiting, and heightened sensitivity to light and sound. The origins of migraine are multifaceted, involving a combination of genetic factors, environmental triggers, hormonal changes, and neurological abnormalities. Migraines are categorized based on their frequency into two main types: episodic migraine, which occurs on fewer than 15 days per month, and chronic migraine, which occurs on 15 or more days per month for a minimum of three months. Chronic migraine places a heavier burden on individuals and necessitates a more thorough management approach. Migraine significantly impacts individuals' quality of life, work productivity, and mental well-being.

Migraine Diagnosis

Diagnosing migraine involves assessing symptoms, reviewing the patient's medical history, and excluding other potential conditions. The process can be challenging due to the diverse nature of migraine symptoms, the absence of specific diagnostic tests, and the similarity of migraine symptoms to those of other disorders, which can lead to underdiagnosis or misdiagnosis. Moreover, migraine is often not reported due to stigma or the perception that the symptoms are normal, delaying necessary treatment. Enhancing awareness among both healthcare professionals and the general public, along with the creation of more accurate diagnostic tools, can help overcome these diagnostic challenges and facilitate better migraine management.

Migraine Treatment

The main objectives of migraine treatment are to alleviate pain, restore normal function, and decrease the frequency of headaches. Another objective may be to prevent the transition from episodic to chronic migraine. Effective treatment also involves addressing any associated health

conditions. The choice of treatment depends on the type of migraine (episodic or chronic), the degree of disability it causes, the patient's previous treatment experiences, and their personal preferences. Clinicians must also take into account any coexisting health issues and the possibility of drug interactions with other medications when selecting a treatment plan. Treatment approaches include educational programs, lifestyle adjustments, trigger avoidance, and both acute and preventive medication strategies. While not all patients with episodic migraines require preventive treatment, it is generally recommended for all patients with chronic migraines.

Migraine Epidemiology

The epidemiology section provides insights into the historical, current, and forecasted epidemiology trends in the seven major countries (7MM) from 2020 to 2034. It helps to recognize the causes of current and forecasted trends by exploring numerous studies and views of key opinion leaders. The epidemiology section also provides a detailed analysis of the diagnosed patient pool and future trends.

Migraine Epidemiology Insights

In 2023, the prevalent population of Migraine in the 7MM was found to be ~119,233 cases. The total prevalent cases of Migraine in the US are expected to increase with a significant CAGR by 2034, from around 46,140k cases in 2023 in the US.

Among the European countries, Germany (22%) had the highest prevalent population of Migraine, followed by Italy in 2023. On the other hand, Spain had the least prevalent population around 17% of Migraine in the same year.

However, the prevalent cases of Migraine are expected to decrease in Germany and Japan attributed to decrease in country population and other factors.

In Japan, among prevalent cases of Migraine, most cases were of Episodic Migraine (~16,331k) in 2023. While least were in Chronic Migraine around ~950k in the same year.

Assessments as per DelveInsight's analysts show that the majority of cases of Migraine are occupied by females in comparison to males. There were approximately ~11,535k male and ~34,605k female cases of Migraine in 2023 in the US.

In EU4 and the UK, among diagnosed cases of Migraine, most cases were of Episodic Migraine (~15,839k) in 2023. While least were in Chronic Migraine around ~2,411k in the same year.

Migraine Epidemiology Segmentation:

The Migraine market report proffers epidemiological analysis for the study period 2020–2034 in the 7MM segmented into:

Total Prevalence of Migraine

Prevalent Cases of Migraine by severity

Gender-specific Prevalence of Migraine

Diagnosed Cases of Episodic and Chronic Migraine

Download the report to understand which factors are driving Migraine epidemiology trends @ [Migraine Epidemiology Forecast](#)

Migraine Drugs Uptake and Pipeline Development Activities

The drugs uptake section focuses on the rate of uptake of the potential drugs recently launched in the Migraine market or expected to get launched during the study period. The analysis covers Migraine market uptake by drugs, patient uptake by therapies, and sales of each drug. Moreover, the therapeutics assessment section helps understand the drugs with the most rapid uptake and the reasons behind the maximal use of the drugs. Additionally, it compares the drugs based on market share.

The report also covers the Migraine Pipeline Development Activities. It provides valuable insights about different therapeutic candidates in various stages and the key companies involved in developing targeted therapeutics. It also analyzes recent developments such as collaborations, acquisitions, mergers, licensing patent details, and other information for emerging therapies.

Migraine Key Companies

Lundbeck Seattle BioPharmaceutical, Eli Lilly and Company, Amgen, Novartis, Teva Pharmaceuticals, Allergan, Biohaven Pharmaceuticals, Dr. Reddy's Labs, AbbVie, Impel NeuroPharma, Zosano Pharma, Axsome Therapeutics, Aeon Biopharma Inc., Ionis Pharmaceuticals, Inc., Charleston Laboratories

Migraine Therapies

EMGALITY (Galcanezumab-gnlm), AJOVY (fremanezumab-vfrm), AXS-07

Migraine Market Outlook

Migraine is a prevalent neurological condition marked by episodes of intense, often one-sided headaches, accompanied by sensitivity to light and sound, nausea, and other symptoms that significantly diminish the quality of life for those affected. It is a leading cause of disability and distress globally, ranking second in terms of years lost to disability worldwide in 2019.

Recent years have seen substantial progress in understanding the complex mechanisms behind migraines, leading to better identification and diagnosis of the condition. Treatment options for migraines can be broadly categorized into acute (abortive) and preventive therapies. Acute treatments are used during an attack to relieve pain and disability, aiming to halt the progression of the migraine. Preventive treatments are employed when there are known triggers, such as exercise or sexual activity, or when exposure to a trigger is limited, like during high-altitude ascents or menstruation.

The primary revenue-generating segments of the acute treatment market include triptans, NSAIDs, analgesics/opioids, and DHE (dihydroergotamine) or ergot alkaloids. Triptans remain the most dominant class in the acute treatment landscape, generating the highest revenue. Examples of major drugs in this class include eletriptan, almotriptan, sumatriptan, rizatriptan, zolmitriptan, and others. Triptans are generally favored over DHE due to their wider range of dosage forms, better tolerability, fewer side effects, and superior efficacy. Acetaminophen, aspirin, and NSAIDs are commonly used for mild to moderate migraine attacks and constitute the next significant group of medications.

Preventive (prophylactic) therapies aim to reduce the frequency, severity, and duration of migraine attacks. FDA-approved preventive agents include propranolol, timolol, divalproex sodium, OnabotulinumtoxinA (Botox), and topiramate, among others. These therapies are categorized into antiepileptics, antihypertensives, and neurotoxins for forecasting purposes. Botox, as a non-daily injectable preventive therapy, has fewer side effects compared to daily oral agents and is specifically approved for chronic migraine.

The competition to capture the untapped market has intensified with the discovery of two key biomarkers as potential therapeutic targets: the serotonin 1F (5-HT_{1F}) receptor and calcitonin gene-related peptide (CGRP).

The year 2019 was a landmark when three CGRP monoclonal antibodies (mAbs) received FDA approval for migraine prevention in adults: Aimovig (erenumab) by Novartis/Amgen, Ajovy (fremanezumab) by Teva, and Emgality (galcanezumab) by Eli Lilly. These products not only became the first drugs specifically designed for migraine prevention but also marked the first new entrants in the preventive market since Botox's expanded approval for chronic migraine in 2010.

Scope of the Migraine Market Report

Study Period: 2020–2034

Coverage: 7MM [The United States, EU5 (Germany, France, Italy, Spain, and the United Kingdom), and Japan]

Key Migraine Companies: Dana-Farber Cancer Institute, Huabo Biopharm Co., Ltd., Beijing Scitech-Mq Pharmaceuticals, Oxford BioMedica, Hutchison Medipharma Limited, Takeda, Amgen, Novartis, AVEO Pharmaceuticals, Inc., Merck Sharp & Dohme LLC, Pfizer, Calithera Biosciences, Inc, AbbVie, Bristol-Myers Squibb, Abbott, SCRI Development Innovations, LLC, Astellas Pharma Inc, and others

Key Migraine Therapies: EMGALITY (Galcanezumab-gnlm), AJOVY (fremanezumab-vfrm), AXS-07, and others

Migraine Therapeutic Assessment: Migraine current marketed and Migraine emerging therapies

Migraine Market Dynamics: Migraine market drivers and Migraine market barriers

Competitive Intelligence Analysis: SWOT analysis, PESTLE analysis, Porter's five forces, BCG

Matrix, Market entry strategies

Migraine Unmet Needs, KOL's views, Analyst's views, Migraine Market Access and Reimbursement

To know more about Migraine companies working in the treatment market, visit @ [Migraine Clinical Trials and Therapeutic Assessment](#)

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Related Reports:

Migraine Pipeline

"Migraine Pipeline Insight, 2024" report by DelveInsight outlines comprehensive insights of present clinical development scenarios and growth prospects across the Migraine market. A detailed picture of the Migraine pipeline landscape is provided, which includes the disease overview and Migraine treatment guidelines.

Migraine Epidemiology

DelveInsight's 'Migraine Epidemiology Forecast to 2034' report delivers an in-depth

understanding of the disease, historical and forecasted Migraine epidemiology in the 7MM, i.e., the United States, EU5 (Germany, Spain, Italy, France, and the United Kingdom), and Japan.

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It also offers Healthcare Consulting Services, which benefits in market analysis to accelerate the business growth and overcome challenges with a practical approach.

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