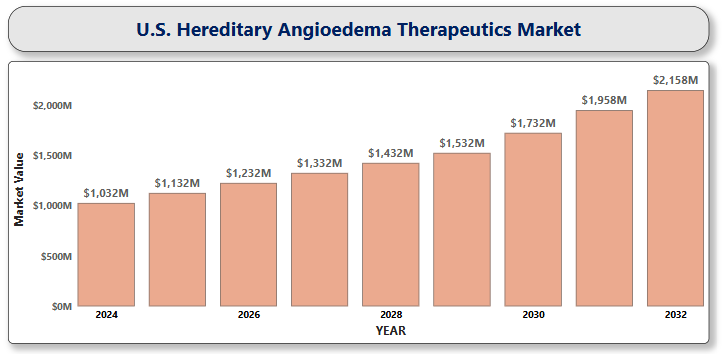
A close-up of hands holding a tablet and a pen

Description automatically generated**U.S. Hereditary Angioedema Therapeutics Market**

According to Intelli, the U.S. Hereditary Angioedema Therapeutics Market size was valued at USD 1,032.42 Million in 2024 and is projected to reach USD 2,158.89 Million by 2032, growing at a CAGR of 10.08% from 2025 to 2032.



Hereditary Angioedema (HAE) is a rare, genetic disorder characterized by recurrent episodes of severe swelling (angioedema) in various parts of the body, including the extremities, face, gastrointestinal tract, and airway. Unlike typical allergic reactions that are driven by histamine release, HAE arises from a deficiency or dysfunction of C1 esterase inhibitor (C1-INH), a critical protein that controls the activity of the complement system and regulates bradykinin levels. When C1-INH is insufficient or not functioning properly, bradykinin accumulates excessively. This peptide increases the permeability of blood vessels, allowing fluid to leak into surrounding tissues and causing the characteristic swelling seen in HAE. HAE is typically inherited in an autosomal dominant pattern, meaning an affected individual has a 50% chance of passing the disorder to their offspring. The disease can manifest at any age but often presents in childhood or adolescence, with symptoms becoming more frequent and severe over time. Episodes of swelling are unpredictable and can be triggered by various factors, including trauma, stress, infection, or even certain medications. Treatment of HAE aims to prevent and manage attacks, reduce their severity, and improve the quality of life for affected individuals. The cornerstone of therapy includes the administration of C1-INH replacement therapies, which help restore the deficient protein and mitigate the symptoms. Other treatment options include bradykinin receptor antagonists and kallikrein inhibitors, which directly target the molecular pathways causing swelling. In addition to acute treatment, long-term prophylactic therapies may be used for frequent attack sufferers to reduce the frequency and severity of episodes. Advances in therapeutic options and a better understanding of the disease are transforming the prognosis for patients, offering more hope and improved outcomes.

**U.S. Hereditary Angioedema Therapeutics Market Definition**

The U.S. Hereditary Angioedema therapeutics market refers to the segment of the pharmaceutical and biotechnology industry dedicated to the research, development, production, and commercialization of drugs and therapies designed to treat Hereditary Angioedema. This market encompasses both acute treatments aimed at managing active A close-up of hands holding a tablet and a pen

Description automatically generatedHAE attacks and long-term prophylactic therapies designed to prevent the onset of these episodes. Therapeutics within this market include C1-INH replacements (both plasma-derived and recombinant), bradykinin B2 receptor antagonists, kallikrein inhibitors, and emerging gene and RNA-based therapies. This market stands at the forefront of rare disease innovation, driving life-saving advancements that transform unpredictable suffering into manageable, empowered living.

**U.S. Hereditary Angioedema Therapeutics Market Overview**

The U.S. Hereditary Angioedema therapeutics market is driven by a combination of clinical, regulatory, and technological factors. A major driver is the increasing awareness and early diagnosis of HAE, leading to greater identification of patients and timely initiation of treatment. Moreover, the market is bolstered by orphan drug designations and a range of regulatory incentives from the FDA, which actively motivate pharmaceutical companies to prioritize and invest in the development of treatments for rare diseases like HAE. Strong research and development pipelines, including advancements in gene therapy, RNA-based treatments, and next-generation biologics, are expanding therapeutic options. Furthermore, strategic collaborations, mergers and acquisitions, and increased healthcare spending in the U.S. are enhancing market growth.

**U.S. Hereditary Angioedema Therapeutics Market Segmentation**

The U.S. HAE therapeutics market can be segmented based on several key criteria, including treatment type, route of administration, and distribution channel.

**U.S. Hereditary Angioedema Therapeutics Market, By Treatment Type**

* **C1 Esterase Inhibitors**
* **Bradykinin B2 Receptor Antagonists**
* **Kallikrein Inhibitors**
* **Others / Emerging Therapies**

The U.S. Hereditary Angioedema therapeutics market is segmented by treatment type, with C1-INH currently holding the largest market share, owing to their long-established role as the standard of care for both acute attacks and prophylaxis. Bradykinin B2 receptor antagonists, such as Icatibant, have gained traction for their rapid relief during acute attacks. Moreover, kallikrein inhibitors particularly the newer oral options like Berotralstat are expanding their market share by offering a more convenient, patient-friendly A close-up of hands holding a tablet and a pen

Description automatically generatedalternative for long-term prevention. The emerging therapies segment, although currently smaller, is expected to witness the fastest growth, fueled by advancements in gene therapy, RNA interference, and next-generation biologics.

**U.S. Hereditary Angioedema Therapeutics Market, By Route of Administration**

* **Intravenous (IV)**
* **Subcutaneous (SC)**
* **Oral**

The U.S. Hereditary Angioedema therapeutics market is segmented by route of administration into intravenous (IV), subcutaneous (SC), and oral therapies, each catering to different patient needs and treatment settings. Intravenous (IV) administration, traditionally used for plasma-derived and recombinant C1 esterase inhibitors, currently holds a significant market share due to its long-standing use and effectiveness in acute and prophylactic treatment. Subcutaneous (SC) therapies have seen a rapid rise in adoption, offering more patient-friendly, home-based treatment options. Oral therapies, a relatively recent advancement in the HAE treatment landscape, are revolutionizing long-term prophylaxis. Products like Berotralstat have set new benchmarks in terms of patient convenience and compliance, making the oral segment the fastest-growing within this classification.

**U.S. Hereditary Angioedema Therapeutics Market, By Distribution Channel**

* **Hospital Pharmacies**
* **Retail Pharmacies**
* **Specialty Pharmacies**

The distribution channels for HAE therapeutics in the U.S. are segmented into hospital pharmacies, retail pharmacies, and specialty pharmacies, each playing a critical role in ensuring the availability of treatments to patients. Hospital Pharmacies remain a key channel for acute treatments. Retail Pharmacies are more commonly involved in dispensing prescription medications that can be used at home for less complex or maintenance therapies. Specialty Pharmacies have become increasingly important in the HAE market, particularly due to the highly specialized nature of many of the medications. These pharmacies handle biologics, rare disease treatments, and injectable medications such as subcutaneous C1-INH and bradykinin antagonists. As patient-centric models grow A close-up of hands holding a tablet and a pen

Description automatically generatedin demand, specialty pharmacies continue to capture a larger share of the market due to their specialized services and support.

**Key Players**

The “U.S. Hereditary Angioedema Therapeutics Market " study report will provide valuable insight emphasizing the U.S. market. The major players in the market Takeda Pharmaceutical Company, CSL Behring, BioCryst Pharmaceuticals, Bayer AG, Pfizer Inc., Emergent BioSolutions, Kaleo, Inc., AbbVie, Horizon Therapeutics, Argenx, Sanofi, Mylan N.V., Bristol Myers Squibb, Merck & Co., Inc., UCB Pharma among others. Our market analysis also entails a section solely dedicated to such major players wherein our analysts provide an insight into the financial statements of all the major players, along with product benchmarking and SWOT analysis.

**Key Developments**

* In 2024, KalVista Pharmaceuticals' oral plasma kallikrein inhibitor, Sebetralstat, received FDA approval for its New Drug Application, bringing a major advancement for patients with acute HAE attacks by offering a convenient, on-demand treatment option.
* In 2024, CSL Behring's monoclonal antibody, Garadacimab, received a positive opinion from the European Medicines Agency, with approval expected in early 2025. This therapy targets activated factor XIIa, a key part of the bradykinin pathway, offering a new way to prevent HAE attacks.

**Market Attractiveness**

The image of market attractiveness provided further helps to get information about the region leading in the U.S. Hereditary Angioedema Therapeutics Market. We cover the major impacting factors driving the industry growth in the given region.

**Porter’s Five Forces**

The image provided would further help to get information about Porter's five forces framework providing a blueprint for understanding the behavior of competitors and a player's strategic positioning in the respective industry. Porter's five forces model can be used to assess the competitive landscape U.S. Hereditary Angioedema Therapeutics A close-up of hands holding a tablet and a pen

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