

## **Restless Legs Syndrome - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Restless Legs Syndrome Market size is estimated at USD 727.58 million in 2025, and is expected to reach USD 937.92 million by 2030, at a CAGR of 5.21% during the forecast period (2025-2030).

During the pandemic period, the market witnessed a significant impact attributed to the increased burden of restless legs syndrome (RLS) in COVID-19-infected patients. For instance, as per the article published by the Journal of Clinical Sleep Medicine in May 2022, a study was conducted in the United States that showed that sleep disturbance was common in long-COVID-19 (LC) patients and RLS was often reported after the viral infection. This led to the increased demand for RLS treatment medications, which has further impacted the market growth during the pandemic period. However, the market is gradually stabilizing as COVID-19 cases declined to result in a return to the pre-pandemic level. Therefore, the COVID-19 pandemic accelerated the treatment of RLS and created lucrative opportunities for market growth in the studied period.

The rise in the prevalence of restless leg syndrome, the high unmet need for treatment, and the increasing geriatric population are key factors responsible for the market's growth. For instance, according to a study published by Frontiers Media S.A. in March 2022, the reported prevalence of restless legs syndrome varied between 3.9% and 14.3% globally. According to the same study, the prevalence of restless legs syndrome was higher among females than males. Thus, the high prevalence of RLS is expected to enhance market growth.

Furthermore, according to a study published in eClinicalMedicine in April 2022, about 25% of people with diabetes showed signs of restless legs syndrome, and people with diabetes had an increased risk of developing restless legs syndrome compared to people without diabetes. Also, according to the data published by the CDC, in June 2022, 37.3 million people in the United States had diabetes, which is approximately 11.3% of the United States population. Thus, the high prevalence of diabetes associated with

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restless leg syndrome is expected to drive market growth over the forecast period.

Additionally, various initiatives taken by the key market players, such as product launches, mergers, acquisitions, and partnerships, are expected to boost the market's growth during the forecast period. For instance, in April 2022, an East Carolina University researcher landed a licensing agreement with Clemens, a professor in the Brody School of Medicine's Department of Physiology, for a patent to treat restless legs syndrome and helped them secure the patent and an eventual licensing agreement with Emalex Biosciences. The partnership gave Emalex potential use for its D1 receptor antagonist, ecopipam. Such an initiative is expected to drive the growth of the market.

Thus, owing to the factors above, such as the high prevalence of restless legs syndrome and the rising initiatives by market players, the market studied is anticipated to grow over the analysis period. However, the side effects associated with restless syndrome treatments are expected to restrain the market's growth.

### Restless Legs Syndrome Market Trends

#### Dopamine Agonists Segment is Expected to Hold a Significant Market Share Over the Forecast Period

Dopamine agonists are most often the first medicines used to treat RLS. These drugs, including pramipexole (Mirapex), rotigotine (Neupro), and ropinirole (Requip), act like the neurotransmitter dopamine in the brain. Factors such as the increase in the prevalence of restless legs syndrome and rising work-related stress caused due to pressure on the nervous system are expected to enhance the usage of dopamine agonists for the treatment of RLS. For instance, an article updated in October 2023 by the National Health Service (NHS) stated that 1 in 10 people are impacted by the restless legs syndrome in the United Kingdom every year, and women are more likely to develop the syndrome than men in the country. Additionally, 1 in 5 pregnant women develops the symptoms in the last trimester of their pregnancy. This leads to an increasing demand for its treatment, driving segmental growth.

Moreover, the increasing use of dopamine agonists for the treatment of restless leg syndrome is the key driver for the segment. For instance, according to the study published by the Nat Sci Sleep in October 2023, treatment with dopamine agonists is effective for up to 60.0% to 90.0% of affected individuals. Thus, such increasing use of dopamine agonists for the treatment of restless leg syndrome is expected to propel the segment growth.

Furthermore, the increase in product launches by the industry players is anticipated to drive the segment's growth. For instance, in July 2021, Ipsen and IRLAB reported signing a licensing agreement, providing Ipsen worldwide development and commercial rights to mesdopetam, a novel dopamine D3-receptor antagonist. Mesdopetam, an oral dopamine D3-receptor antagonist, has completed Phase Ib and IIa clinical programs. Such development is expected to increase the demand for segmental growth.

Thus, owing to the abovementioned factors, such as the high prevalence of RLS, the growing use of dopamine agonists for the treatment of RLS, and the increase in product launches by the industry players, the segment is expected to grow over the analysis period.

#### North America is Expected to Hold a Significant Share in the Market Over the Forecast Period

North America is expected to hold a significant market share in the restless legs syndrome market due to the region's rising prevalence of restless legs syndrome. For instance, according to an article published by the National Institutes of Health in February 2023, it was estimated that up to seven to 10% of the United States population have RLS, which can begin at any age. It occurs in males and females, although females are likelier to have it. Many severely affected individuals are middle-aged or older, and the symptoms typically become more frequent and last longer with age.

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Similarly, as per the American Association of Neuromuscular & Electrodiagnostic Medicine report, in February 2022, about 12 million people in the United States had restless legs syndrome. Thus, with an increase in the prevalence of RLS, the demand for its treatment increases, thereby driving regional growth over the forecast period.

The increasing number of research programs is also expected to boost the studied market. For instance, Restless Legs Syndrome Foundation, Inc. awarded its 2023 RLS Research Grant to a researcher from the University of Toronto for its extensive research on using Canadian-approved cannabidiol/tetrahydrocannabinol topical oil to treat restless legs syndrome. The Canadian RLS Foundation funded the study. The Restless Legs Syndrome Foundation is highly expanding its reach in Canada and the United States, it has more than 70 groups and a network of remote support across Canada and the United States. The organization has also launched a Quality Care Center program to offer services and care to patients.

Therefore, the factors mentioned earlier, such as the high prevalence of RLS and growing research programs for RLS, will likely contribute to market growth over the forecast period in the North American region.

### Restless Legs Syndrome Industry Overview

The restless legs syndrome market is moderately fragmented in nature due to the presence of several companies operating globally and regionally. The competitive landscape includes analyzing companies Azurity Pharmaceuticals, LLC, Glenmark Pharmaceutical, UCB S.A., Sun Pharmaceutical Industries Ltd, Boehringer Ingelheim International GmbH, Relegs, Restiffic, Viatrix Inc., Psychocare Health Private Limited, and Noctrix Health, Inc. among others.

#### Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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