

## **Bipolar Disorders Treatment - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-09-01 | 114 pages | Mordor Intelligence

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### **Report description:**

Bipolar Disorders Treatment Market Analysis

The bipolar disorders treatment market is valued at USD 5.01 billion in 2025 and is forecast to reach USD 5.82 billion by 2030, advancing at a 2.55% CAGR. Prescriber preference for second-generation antipsychotics (SGAs), broader reimbursement under mental-health parity rules, and accelerating uptake of digital therapeutics collectively sustain growth momentum. The 2025 acquisition of Intra-Cellular Therapies by Johnson & Johnson vaults Caplyta into a leading position for bipolar depression and underscores renewed strategic emphasis on neuroscience portfolios. Long-acting injectables (LAIs) are proving cost-effective by curbing relapse-linked hospitalizations, while AI-driven diagnostic tools shrink the historical treatment-initiation gap. Competitive focus is shifting toward metabolic-sparing combinations and precision digital monitoring, signaling a market pivot from volume to value.

Global Bipolar Disorders Treatment Market Trends and Insights

Rising Prevalence & Earlier Diagnosis of Bipolar Spectrum Disorders

Machine-learning classifiers now distinguish bipolar disorder from major depression with 85% pooled accuracy, cutting historic misdiagnosis lags that averaged 9.5 years. Blood-based RNA-editing biomarker panels validated with 0.904 AUC make earlier prodromal-phase intervention feasible. Smartphone-based digital phenotyping detects mood-state shifts with 88% sensitivity and 89% specificity relative to clinician assessments, while sustained telemedicine utilization broadens specialty access in

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underserved communities. Earlier recognition is translating into swifter treatment initiation, lower disability-adjusted life-year burdens, and heightened demand across every stage of the bipolar disorders treatment market.

#### Government-Led Mental-Health Parity Laws & Reimbursement Expansion

Final rules under the Mental Health Parity and Addiction Equity Act effective January 2025 compel private health plans to prove equivalent access metrics for mental-health and medical benefits. New CMS billing codes extend Medicare and Medicaid reimbursement to prescription digital therapeutics, setting a precedent later echoed by several European payers. Region-wide EMA coordination eliminates duplicative trials, shortening time-to-market for novel agents. These policies reduce out-of-pocket costs, improve adherence, and support measurable cost-savings from fewer acute-care episodes—all reinforcing steady demand within the bipolar disorders treatment market.

#### Persistent Safety Concerns (Weight Gain, Metabolic Risk) for SGAs

Studies indicate 4-13% of SGA-treated patients gain at least 7% body weight, compared with 2-5% on placebo. Clozapine induces metabolic syndrome in about 30% of users, prompting regulators to mandate routine BMI and glycemic monitoring. Metformin remains the most-studied adjunct for psychotropic-related weight gain, while GLP-1 receptor agonists enter phase-3 evaluation as combination partners. These cardiometabolic liabilities temper prescribing enthusiasm, especially for patients with pre-existing risk factors, and could modestly dampen bipolar disorders treatment market growth.

Other drivers and restraints analyzed in the detailed report include:

Rapid Uptake of Second-Generation Antipsychotics & Long-Acting Injectables / Digital Phenotyping & AI-Driven Screening Tools Boosting Treatment Rates / High Mis-/Under-Diagnosis in Primary-Care Settings /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Second-generation antipsychotics held 51.45% of bipolar disorders treatment market share in 2024, underscoring their broad efficacy across all mood phases. Quetiapine and lurasidone illustrate dual dopamine-serotonin modulation that stabilizes mania and depression, aligning with 2024 Veterans Affairs treatment algorithms. Lithium prescriptions fell from 31% to 16% of patients due to monitoring burdens, though its neuroprotective value endures. Anticonvulsants such as lamotrigine safeguard cognitive function and remain central to maintenance therapy.

Antidepressants represent the fastest-growing category, expanding at a 4.23% CAGR as Caplyta gains traction for bipolar depression. Regimens increasingly combine antidepressants with mood stabilizers to prevent manic switching, broadening therapeutic flexibility. Pipeline diversity spans glutamate and GABA modulators that seek superior tolerability. Collectively, these trends reinforce sustained revenue generation inside the bipolar disorders treatment market while opening room for differentiated newcomers across the bipolar disorder industry.

Dopamine D<sub>2</sub>/D<sub>3</sub> partial agonists accounted for 37.43% of the bipolar disorders treatment market size in 2024, reflecting a balance of efficacy and softer side-effect profiles. Aripiprazole's stabilizing action without full receptor blockade typifies this class's appeal and spurs similar candidates in mid-stage trials.

Glutamate-pathway agents show the highest forward CAGR at 4.78% as ketamine's rapid antidepressant response validates NMDA

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receptor targeting. Serotonin-norepinephrine reuptake inhibitors preserve utility where cognitive activation is a therapeutic goal, although selective serotonin reuptake inhibitors require mood-stabilizer co-administration. GABA modulators and ion-channel stabilizers, led by lithium and lamotrigine, continue as backbone options. Mechanistic diversification reduces clinical inertia and broadens prescriber choice throughout the bipolar disorders treatment market.

The Bipolar Disorders Treatment Market Report is Segmented by Drug Class (Mood Stabilizers, and More), Mechanism of Action (Selective Serotonin Reuptake Inhibitor, and More), Disease Type (Bipolar I Disorder, and More), Distribution Channel (Hospital Pharmacies, and More), Treatment Setting (In-Patient, and More), Geography (North America, Europe, and More). The Market Forecasts are Provided in Terms of Value (USD).

### Geography Analysis

North America dominated the bipolar disorders treatment market with 42.56% share in 2024. Parity-law enforcement effective 2025 obliges health plans to match mental-health benefits with medical coverage. Early uptake of LAIs and rapid pathways for digital therapeutics speed diffusion of innovation. FDA approvals for Uzedy and Fanapt reinforce treatment diversity, while integrated delivery networks negotiate value-based contracts that reward relapse reduction.

Europe maintains robust demand through centralized EMA approvals that streamline cross-border launches. Universal healthcare financing guarantees baseline access, although country-specific health-technology assessments steer price negotiations. Variability in legacy lithium use reflects differing monitoring infrastructures, and post-Brexit divergence may lengthen UK-specific timelines for certain agents.

Asia-Pacific is the fastest-growing region at 3.56% CAGR. China's regulatory reforms trimmed NDA review times and widened reimbursement for innovative therapies, strengthening commercial cases for novel agents. Japan's annual drug-price revisions nudge manufacturers to pursue high-value indications, while India's generic manufacturing base rises as a global supplier. Nonetheless, limited specialist density and diagnostic under-recognition still temper treated-prevalence gains, leaving substantial headroom in the bipolar disorders treatment market.

### List of Companies Covered in this Report:

Johnson & Johnson / Otsuka / Abbvie / Eli Lilly and Company / AstraZeneca / Pfizer / GlaxoSmithKline / Novartis / Lundbeck A/S / Sunovion (Sumitomo Pharma) / Intra-Cellular Therapies Inc. / Vanda Pharmaceuticals / Acadia Pharmaceuticals Inc. / Alkermes plc / Bristol-Myers Squibb / Roche / Teva Pharmaceutical Industries / Aurobindo Pharma Ltd. / Dr Reddy's Laboratories Ltd. / Cipla / Hikma Pharmaceuticals /

### Additional Benefits:

The market estimate (ME) sheet in Excel format /  
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