

## **Menopausal Hot Flashes - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-08-01 | 117 pages | Mordor Intelligence

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### **Report description:**

Menopausal Hot Flashes Market Analysis

The menopausal hot flashes market size reached USD 7.62 billion in 2025 and is projected to climb to USD 9.27 billion by 2030, translating into a 5.02% CAGR over the forecast window; the menopausal hot flashes market size outlook therefore reflects steady mid-single-digit expansion anchored in demographic momentum, therapeutic innovation, and widening access pathways. Growing life expectancy is adding millions of women to the symptomatic pool each year, while first-in-class NK-3 receptor antagonists and smarter hormone delivery systems are broadening the clinical tool kit. At the same time, digital prescription fulfillment, employer-backed wellness programs, and regulatory clarity around neurokinin blockers are flattening traditional access barriers, allowing the menopausal hot flashes market to move from episodic care toward proactive symptom management. Competitive intensity is rising as multinational firms race to secure first-mover advantage in non-hormonal categories, yet supply-chain investments and partnership models are also improving therapy availability in mid-income economies. Collectively, these forces reinforce a demand curve that is largely decoupled from macroeconomic cycles and position the menopausal hot flashes market for sustained top-line growth.

Global Menopausal Hot Flashes Market Trends and Insights

Rising Post-Menopausal Population Base

The global post-menopausal cohort is projected to touch 1.2 billion women by 2030, guaranteeing a long-run expansion corridor

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for the menopausal hot flashes market. Extended life expectancy and later childbearing have stretched the post-menopausal window, increasing symptomatic years and therapy needs. In Japan, productivity data show 9% of women in their 40s and 50s leaving the workforce due to unmanaged vasomotor symptoms, underscoring economic stakes that go beyond clinical care. U.S. analyses estimate USD 1.8 billion in annual absenteeism linked directly to hot flashes, motivating employers to add menopause care to wellness budgets. Because demographic pressure operates independently of therapeutic breakthroughs, it gives the market a durable floor even when innovation cycles slow. As a result, capacity planning for drug production and digital support services has become a strategic imperative for suppliers seeking first-call status with payers and corporate buyers.

#### Growing Pharmaceutical Investment in Women's Health

Between 2018 and 2023 venture funding for women's health startups rose 314%, funneling capital toward non-hormonal R&D, specialized telehealth networks, and smart-patch technologies. Public-company commitments mirror this trend: Bayer values elinzanetant at USD 1 billion in peak sales potential, while Astellas targets USD 2.2-3.4 billion for fezolinetant. M&A activity is also heating up as firms acquire late-stage assets to offset patent cliffs; Cosette Pharmaceuticals' USD 430 million purchase of Mayne Pharma's women's health division exemplifies this consolidation wave. Collectively, capital inflows have shortened development timelines, accelerated multi-center trials, and increased the probability of combo-therapy launches that could expand both adherence and pricing power inside the menopausal hot flashes market.

#### Long-Term Safety Concerns With Hormone Therapy

The 2002 Women's Health Initiative findings still influence prescribing habits; current U.S. data show hormone therapy uptake languishing at roughly 6%, well below clinical eligibility thresholds. Safety anxieties persist even as newer trials confirm benefit-risk balance for women who initiate therapy within 10 years of menopause onset. Fezolinetant's label mandates liver-function monitoring, adding clinical friction and reinforcing consumer wariness toward pharmacologic intervention. Asian markets amplify the issue: only 7.2% of post-menopausal women in East Asia use hormone therapy, despite symptom severity scores comparable to Western cohorts. Ongoing debates about cancer, cardiovascular risk, and cognitive outcomes therefore keep a meaningful share of the symptomatic population in watch-and-wait mode, trimming the addressable share of the menopausal hot flashes market.

Other drivers and restraints analyzed in the detailed report include:

Advancements in Non-Hormonal Therapeutics / Expansion of Digital Direct-to-Consumer Care Platforms / Limited Insurance Coverage in Emerging Economies /

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

#### Segment Analysis

Hormonal therapy retained 54.23% share of the menopausal hot flashes market in 2024, buoyed by extensive clinical familiarity and insurance coverage, yet the non-hormonal category is set to outpace all others at a 7.54% CAGR to 2030. The menopausal hot flashes market size for NK-3 receptor antagonists alone could exceed USD 3 billion by the end of the forecast, driven by superior tolerability profiles relative to estrogen-progesterone regimens. Estrogen + progestin combinations remain the hormonal backbone because they mitigate endometrial hyperplasia risk, whereas estrogen-only pills serve women with prior hysterectomy. Parallel usage of SSRIs, SNRIs, and gabapentinoids continues for patients contraindicated for estrogen, although off-label status limits payer support and advertising reach. Pipe-line data show elinzanetant improving sleep scores by 30% over placebo at Week 12 and reducing hot-flash frequency by more than 50%. Herbal supplements keep a visible but unregulated footprint, reflecting consumer preference for "natural" options despite limited randomized-trial evidence.

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Scaling up, non-hormonal options help re-engage breast-cancer survivors and cardiovascular-risk patients who had previously abandoned therapy, thereby expanding the overall menopausal hot flashes market addressable population. As safety labeling matures and real-world evidence accumulates, major manufacturers are deploying multipronged promotion that blends direct-to-consumer campaigns with physician-education grants. In parallel, insurer contracts are increasingly outcomes-based, rewarding products that cut absenteeism and reduce sleep-related comorbidities. Combined, these forces could see non-hormonal products command more than one-third of revenue by 2030, materially changing competitive equations across the wider menopausal hot flashes industry.

Oral tablets generated 48.65% of 2024 sales, a clear testament to legacy physician comfort and mature distribution infrastructure inside the menopausal hot flashes market. However, transdermal systems are forecast to record the strongest 7.65% CAGR through 2030, propelled by favorable cardiovascular risk profiles and easier dose tailoring. Transdermal estrogen avoids first-pass hepatic metabolism, reducing thrombotic risk and making it a default recommendation for women with obesity or smoking histories. Market entrants such as MenoPatch allow clinicians to adjust dosing within 3-4 weeks, slashing the trial-and-error period that often frustrates adherence.

Injectable and topical formats remain important for niche patient sets requiring tight pharmacokinetics or combination hormone delivery, yet administration complexity and clinic-visit costs limit widespread uptake. Looking ahead, smart patches with Bluetooth-enabled adherence tracking could push transdermal adoption even higher, especially once payers recognize the long-term savings tied to cardiovascular safety. The menopausal hot flashes market size tied to transdermal modalities may therefore exceed USD 2 billion by 2030 if current development pipelines stay on schedule.

The Menopausal Hot Flashes Market Report is Segmented by Treatment Type (Hormonal Treatment and Non-Hormonal Treatment), Route of Administration (Oral, and More), Distribution Channel (Hospital Pharmacies, and More), Menopausal Stage (Perimenopause and Post-Menopause), and Geography (North America, Europe, Asia-Pacific, Middle East & Africa, South America). The Market Forecasts are Provided in Terms of Value (USD).

#### Geography Analysis

North America accounted for 42.54% of menopausal hot flashes market revenue in 2024, underpinned by favorable reimbursement, high diagnosis rates, and rapid incorporation of non-hormonal launches. FDA approvals of fezolinetant and ongoing review of elinzanetant keep the region at the forefront of therapeutic adoption. Employers are quantifying productivity losses at USD 1.8 billion annually, prompting HR departments to fund menopause benefits, which in turn elevate prescription volumes. Canada mirrored U.S. momentum, granting regulatory clearance for Veozah in 2024 and aligning payer coverage across provinces, while Mexico's expanding middle class is improving private-insurance penetration, albeit from a low base.

Asia-Pacific is the fastest-growing theater at a 6.45% CAGR thanks to demographic scale and gradual erosion of cultural stigma. Japan runs dedicated menopause centers that provide multidisciplinary care, an approach spurred by data showing USD 12 billion in annual productivity losses from unmanaged symptoms. China houses an estimated 280 million menopausal women, yet treatment penetration remains just 5.66%, suggesting outsized headroom for growth as telehealth and low-cost generics gain traction. Australia's Pharmaceutical Benefits Scheme addition of three therapies in 2025 slashed out-of-pocket expense by up to 90%, setting a policy template other APAC markets may emulate.

Europe sustains moderate expansion as universal healthcare cushions patient costs and EMA reviews streamline pan-regional launches. Supply interruptions in oral estrogen products have opened white-space for innovative patches and gels, while corporate wellness programs in the United Kingdom now reimburse virtual menopause consults, echoing North American trends. Middle East & Africa and South America remain underpenetrated but show improving fundamentals: urbanization, rising female

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labor-force participation, and digital-health pilots are making hot-flash therapy more accessible. However, limited insurance frameworks and cultural conservatism still temper near-term uptake, keeping regional share below 10% of the menopausal hot flashes market through 2030.

List of Companies Covered in this Report:

Abbvie / Bayer / Pfizer / Organon / Astellas Pharma / Novo Nordisk / Hisamitsu Pharma (Noven) / Theramex / Besins Healthcare / Viatris / Mithra Pharmaceuticals / Knight Therapeutics Inc. / Lupin / Cipla / Sun Pharma Ind. Ltd. / Teva Pharmaceutical Ind. / Endoceutics Inc. / Ferring Pharmaceuticals / Eisai / KaNDy Therapeutics / P&G Health (Serenol) /

Additional Benefits:

<ul> The market estimate (ME) sheet in Excel format /  
3 months of analyst support / </ul>

## **Table of Contents:**

### 1 Introduction

#### 1.1 Study Assumptions & Market Definition

#### 1.2 Scope of the Study

### 2 Research Methodology

### 3 Executive Summary

### 4 Market Landscape

#### 4.1 Market Overview

#### 4.2 Market Drivers

##### 4.2.1 Rising Post-Menopausal Population Base

##### 4.2.2 Growing Pharmaceutical Investment In Women's Health

##### 4.2.3 Advancements In Non-Hormonal Therapeutics

##### 4.2.4 Expansion Of Digital Direct-To-Consumer Care Platforms

##### 4.2.5 Inclusion Of Menopause Care In Corporate Wellness Programs

##### 4.2.6 Adoption Of Personalized Hormone Delivery Technologies

#### 4.3 Market Restraints

##### 4.3.1 Long-Term Safety Concerns With Hormone Therapy

##### 4.3.2 Limited Insurance Coverage In Emerging Economies

##### 4.3.3 Cultural Stigma Hindering Treatment Seeking

##### 4.3.4 Regulatory Uncertainty For Novel Neurokinin Antagonists

#### 4.4 Regulatory Landscape

#### 4.5 Porter's Five Forces Analysis

##### 4.5.1 Bargaining Power Of Suppliers

##### 4.5.2 Bargaining Power Of Buyers

##### 4.5.3 Threat Of New Entrants

##### 4.5.4 Threat Of Substitutes

##### 4.5.5 Intensity Of Competitive Rivalry

### 5 Market Size & Growth Forecasts (Value, USD)

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- 5.1 By Treatment Type
  - 5.1.1 Hormonal Treatment
    - 5.1.1.1 Estrogen
    - 5.1.1.2 Progesterone
    - 5.1.1.3 Estrogen-Progesterone Combination
  - 5.1.2 Non-Hormonal Treatment
    - 5.1.2.1 NK-3 Receptor Antagonists
    - 5.1.2.2 SSRIs
    - 5.1.2.3 SNRIs
    - 5.1.2.4 Gabapentinoids
    - 5.1.2.5 Herbal & Dietary Supplements
- 5.2 By Route Of Administration
  - 5.2.1 Oral
  - 5.2.2 Transdermal
  - 5.2.3 Parenteral (Injectable)
  - 5.2.4 Topical (Gel/Cream)
- 5.3 By Distribution Channel
  - 5.3.1 Hospital Pharmacies
  - 5.3.2 Retail Pharmacies
  - 5.3.3 Online Pharmacies
- 5.4 By Menopausal Stage
  - 5.4.1 Perimenopause
  - 5.4.2 Post-Menopause
- 5.5 Geography
  - 5.5.1 North America
    - 5.5.1.1 United States
    - 5.5.1.2 Canada
    - 5.5.1.3 Mexico
  - 5.5.2 Europe
    - 5.5.2.1 Germany
    - 5.5.2.2 United Kingdom
    - 5.5.2.3 France
    - 5.5.2.4 Italy
    - 5.5.2.5 Spain
    - 5.5.2.6 Rest of Europe
  - 5.5.3 Asia-Pacific
    - 5.5.3.1 China
    - 5.5.3.2 Japan
    - 5.5.3.3 India
    - 5.5.3.4 Australia
    - 5.5.3.5 South Korea
    - 5.5.3.6 Rest of Asia-Pacific
  - 5.5.4 Middle East & Africa
    - 5.5.4.1 GCC
    - 5.5.4.2 South Africa
    - 5.5.4.3 Rest of Middle East & Africa
  - 5.5.5 South America

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- 5.5.5.1 Brazil
- 5.5.5.2 Argentina
- 5.5.5.3 Rest of South America

## 6 Competitive Landscape

### 6.1 Market Concentration

### 6.2 Market Share Analysis

6.3 Company Profiles (includes Global level Overview, Market level overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and analysis of Recent Developments)

#### 6.3.1 AbbVie Inc. (Allergan)

#### 6.3.2 Bayer AG

#### 6.3.3 Pfizer Inc.

#### 6.3.4 Organon & Co.

#### 6.3.5 Astellas Pharma Inc.

#### 6.3.6 Novo Nordisk A/S

#### 6.3.7 Hisamitsu Pharma (Noven)

#### 6.3.8 Theramex

#### 6.3.9 Besins Healthcare

#### 6.3.10 Viatris Inc.

#### 6.3.11 Mithra Pharmaceuticals

#### 6.3.12 Knight Therapeutics Inc.

#### 6.3.13 Lupin Ltd.

#### 6.3.14 Cipla Ltd.

#### 6.3.15 Sun Pharma Ind. Ltd.

#### 6.3.16 Teva Pharmaceutical Ind.

#### 6.3.17 Endoceutics Inc.

#### 6.3.18 Ferring Pharmaceuticals

#### 6.3.19 Eisai Co. Ltd.

#### 6.3.20 KaNDy Therapeutics

#### 6.3.21 P&G Health (Serenol)

## 7 Market Opportunities & Future Outlook

### 7.1 White-Space & Unmet-Need Assessment

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