

## Market insights summary

# Global botulinum toxin market

## What's trending?

### 01. New product launches and indication expansions provide growth opportunities

- New product launches and indication expansions are creating significant growth opportunities in the global therapeutic botulinum toxin (BTX) market.
- Revance Therapeutics is emerging as a one of the competitors to Allergan's BOTOX with the introduction of DAXXIFY and was recently commercially launched for cervical dystonia.
- Meanwhile, Merz Pharma expanded its

presence in the Asia Pacific region with XEOMIN approvals for chronic sialorrhea in Australia and Japan, signaling continued geographic and indication expansion.

### 02. New clinical trials conducted in the chronic migraine space are set to reshape the market

- Competitors are actively conducting trials targeting the migraine indication to compete with Allergan's BOTOX.
- Ipsen and Merz Pharma are not only focusing on the chronic migraine indication, but also episodic migraine.
- If successful, trial data could be used to support expanded use of XEOMIN and Dysport in migraine management, potentially increasing procedure volumes and intensifying competition with other BTX brands such as BOTOX.

Access more insights and data in the [report](#).

[Speak to our team](#) to see how we can power your innovation.

## 2024 global therapeutic botulinum toxin market snapshot

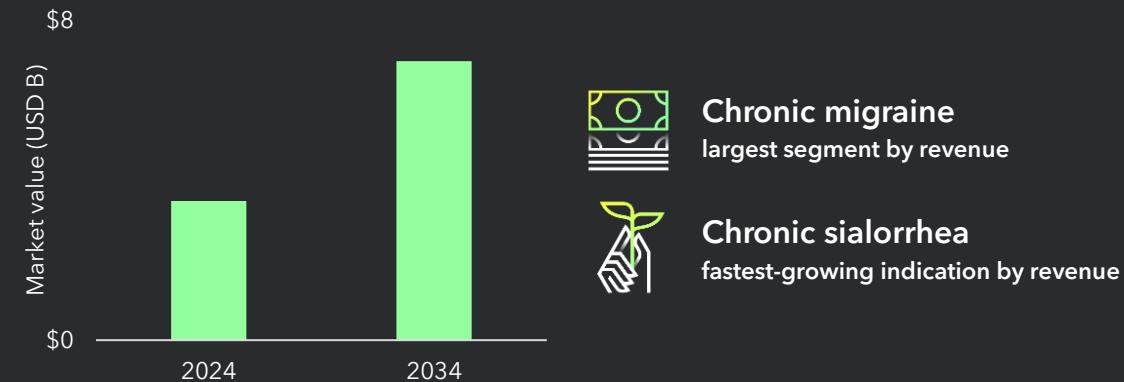
**\$3.5B**

Market value

**8.1%**

CAGR ('19-'34)

### Global therapeutic botulinum toxin market

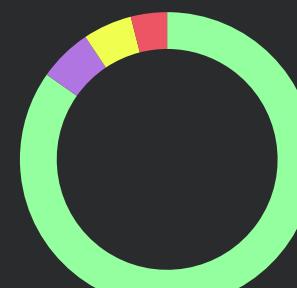


**Chronic migraine**  
largest segment by revenue



**Chronic sialorrhea**  
fastest-growing indication by revenue

### 2024 global competitive landscape



- Allergan
- Merz Pharma
- Ipsen
- Other

### Proportion of therapeutic botulinum toxin revenues by region

