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The company's latest report states that the main driver of this extensive growth, which will occur across the seven major markets (7MM) of the US, France, Germany, Italy, Spain, the UK, and Japan, will be the launch of efficacious disease-modifying drugs, Raptor's RP103 and Prana Biotechnology's PBT2.

Other drivers include the anticipated launch of enhanced symptomatic treatments, potential patient assistance programs which will reimburse expensive therapies, and an increase in the treatment rate of Huntington's disease patients.

Ms Rebecca Robbins, GlobalData's Analyst covering Neurology and Ophthalmology, explains: "The scope for improvement in the Huntington's disease space is vast, with the greatest unmet need being the development of a disease-modifying drug that will slow or halt the progression of the disease, or prevent its development. In this way, the launch of such a drug would be a game-changer.

"Currently, Raptor's RP103 is positioned to be the first potential disease-modifying drug to reach the market, giving it an important advantage over other disease-modifying drugs in the late-stage pipeline. Its main competitor will be Prana Biotechnology's PBT2, which is the only late-stage drug in the pipeline that is aiming to demonstrate an improvement in the cognitive deficits associated with the disease in clinical trials."

Of the 7MM, PBT2 and RP103 are expected to be launched in all but Japan by 2024, with Japan seeing the smallest market expansion of all the countries, rising from $0.6 million in 2014 to $1.5 million by 2024, at a CAGR of 10%.

This is still very robust growth, however, and can be attributed primarily to the launch of Teva's SD-809 and pridopidine, both symptom-alleviating drugs. SD-809 is anticipated to launch in Japan in 2020, with sales in this market forecast to be worth $1.1 million in 2024.

Ms Robbins concludes: "The Huntington's disease pipeline will see exciting new developments over the next decade as

disease-modifying drugs transform the market landscape. With ongoing research helping to further understand its pathogenesis, there are increasingly significant opportunities for developers to cultivate new drugs that may have differing modes of action from those already in the pipeline."