

# Digital Therapeutics Apps

ANMD-MRS12-113 · Digital Health & Clinical AI Technologies

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

## WHY THIS REPORT

Digital therapeutics (DTx) deliver evidence-based clinical interventions through software — treating, managing and preventing disease via apps validated in clinical trials, spanning prescription DTx (PDT), wellness, behavioural-health, chronic-disease and companion/adjunct therapies. This decision-grade study sizes the global market three ways — value, prescriptions/enrolments and active users — across therapeutic category, prescription status and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

## SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

The sustainability case here is social and systemic. DTx can democratise access to evidence-based therapy, especially in behavioural health, while raising equity, evidence and data-governance questions.

Mapped Sustainable Development Goals:

<b>SDG 3</b> Good Health & Well-Being	<b>SDG 9</b> Industry, Innovation & Infrastructure	<b>SDG 10</b> Reduced Inequalities	<b>SDG 12</b> Responsible Consumption	<b>SDG 17</b> Partnerships for the Goals
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Measurable sustainability outcomes assessed:

- Scalable, evidence-backed therapy and improved adherence
- Access where clinicians are scarce
- Democratized behavioural-health care
- Health equity, clinical-evidence integrity and engagement ethics as material risks

**Framework alignment:** Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

## WHAT'S INSIDE AT A GLANCE

<b>53</b> Chapters	<b>9</b> Report Parts	<b>7</b> Regions Covered	<b>40+</b> Country Markets
<b>2025–32</b> Forecast Horizon	<b>4</b> Forward Scenarios	<b>20+</b> Companies Profiled	<b>5</b> SDGs Mapped

## REPORT COVERAGE

**Geographic scope:** North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. North America leads the market; Europe pioneers reimbursement; Asia Pacific grows fastest; other regions assessed on their own merits.

## MARKET OVERVIEW

**From the first-wave reset to evidence-led economics — where clinical evidence separates DTx from wellness apps.**

Digital therapeutics is navigating a reset — past the first wave of reimbursement setbacks toward sustainable, evidence-driven models. Demand is driven by behavioural-health need, chronic-disease management and employer and payer interest across North America, Europe and Asia Pacific. The market is read three ways — value, prescriptions/enrolments and active users — and forecast under four scenarios, each region reported separately.

- **North America leads the market** — United States and Canada, on FDA-authorized PDTs and employer/payer channels
- **Europe pioneers reimbursement** — Germany's DiGA fast-track pathway and growing national digital-health coverage
- **Asia Pacific grows fastest** — Japan, China and South Korea, combining regulatory pilots with large patient demand
- **Clinical evidence is the differentiator** — randomised-trial validation and real-world evidence separate reimbursable DTx from wellness apps

## REGIONAL OUTLOOK

Across seven reporting regions, the report separates leading markets from high-growth and emerging ones — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
North America	Market leader	United States, Canada — FDA PDTs, employer & payer channels
Europe	Reimbursement pioneer	Germany (DiGA), France, UK — reimbursement fast-track
Asia Pacific	Fastest growth	Japan, China, South Korea — regulatory pilots, demand
Middle East	Emerging	UAE, Saudi Arabia — digital-health strategy, sovereign investment
Latin America	Emerging	Brazil, Chile — behavioural-health access, mobile reach
Africa	Frontier	South Africa, Kenya — mobile health, access expansion

## KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> <li>• Behavioural-health access gaps</li> <li>• Chronic-disease management need</li> <li>• Germany DiGA &amp; emerging reimbursement</li> <li>• Employer &amp; payer demand</li> <li>• Scalable, evidence-based delivery</li> </ul>	<ul style="list-style-type: none"> <li>• Reimbursement-model uncertainty</li> <li>• Clinical-evidence &amp; trial cost burden</li> <li>• Patient engagement &amp; adherence decay</li> <li>• Regulatory fragmentation across markets</li> <li>• Prescriber &amp; channel-access barriers</li> </ul>

## SEGMENTATION SNAPSHOT

<b>By Therapeutic Category</b>	Behavioural-health · chronic-disease · prescription DTx (PDT) · wellness / non-prescription · companion / adjunct
<b>By Prescription Status</b>	Prescription (PDT) · non-prescription / wellness · payer-distributed
<b>By Application</b>	Hospitals · clinics & outpatient · home / community
<b>By End User</b>	Hospitals · health systems · payers · clinicians · patients
<b>By Scale</b>	Departmental · enterprise · health-system / national
<b>By Business Model</b>	SaaS subscription · per-use · managed services

## TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

### Part I — Report Foundation, Discovery and Strategic Intelligence

- > Chapter 1. Scope, Methodology and Report Architecture
- > Chapter 2. Industry Discovery Summary — Digital Therapeutics Apps
- > Chapter 3. Executive Intelligence and Decision Dashboard
- > Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

### Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- > Chapter 5. Industry Overview and Market Evolution
- > Chapter 6. Market Dynamics
- > Chapter 7. Global Market Size and Forecast, 2020–2032
- > Chapter 8. Market Segmentation Analysis
- > Chapter 9. End-User and Demand-Side Intelligence
- > Chapter 10. Pricing, Cost and Commercial Model Intelligence

### Part III — Regional and Country Intelligence

- > Chapter 11. Global Regional Intelligence Framework
- > Chapter 12. North America Market Intelligence
- > Chapter 13. Europe Market Intelligence
- > Chapter 14. Asia Pacific Market Intelligence
- > Chapter 15. Latin America Market Intelligence
- > Chapter 16. Africa Market Intelligence
- > Chapter 17. Middle East Market Intelligence
- > Chapter 18. Rest of World Market Intelligence

### Part IV — Technology, Innovation and Category-Specific Intelligence

- > Chapter 19. Technology Landscape and Architecture
- > Chapter 20. Emerging and Next-Generation Technology Intelligence
- > Chapter 21. Category-Specific Intelligence Module
- > Chapter 22. Research, Innovation and Funding Landscape

**Part V — Company, Competition, Patent and Project Intelligence**

- › Chapter 23. Competitive Landscape
- › Chapter 24. Company Profiles
- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

**Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence**

- › Chapter 28. Sustainability Intelligence Suite
- › Chapter 29. ESG Intelligence and Double Materiality
- › Chapter 30. ESG and Sustainability Framework Alignment
- › Chapter 31. SDG Intelligence
- › Chapter 32. Carbon, Net-Zero and Climate-Mitigation Intelligence
- › Chapter 33. Water, Biodiversity and Natural-Capital Intelligence
- › Chapter 34. Circular Economy and Resource-Security Intelligence
- › Chapter 35. Social Impact, Human Capital and Community Intelligence
- › Chapter 36. Climate Risk, Adaptation and Resilience Intelligence

**Part VII — Supply Chain, Policy, Legal, Economics and Finance**

- › Chapter 37. Value Chain, Supply Chain and Geopolitical Intelligence
- › Chapter 38. Policy, Regulation and Incentive Intelligence
- › Chapter 39. Legal, Contracting and Risk-Allocation Intelligence
- › Chapter 40. Unit Economics, CAPEX, OPEX and Return Analysis
- › Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

**Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict**

- › Chapter 42. Scenario Analysis and Future Intelligence
- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

**Part IX — Annexes, Directories and Reference Material**

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

**COMPETITIVE & INVESTMENT SNAPSHOT**

The competitive field spans prescription-DTx developers, chronic-disease and behavioural-health platforms, and payer-distributed players. Deal activity — DiGA listings, payer and employer contracts and business-model pivots — signals a market re-forming around sustainable, evidence-led economics.

**Representative players profiled in the full report:**

Akili Interactive Labs, Inc. · Omada Health, Inc. · Big Health Ltd. · DarioHealth Corp. · Click Therapeutics, Inc. · and further profiled players across prescription-DTx and behavioural-health platforms.

**Investment intelligence:** venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a conditional investment view.

## KEY QUESTIONS THIS REPORT ANSWERS

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- How large is the global digital therapeutics market, and how fast will it grow to 2032?
- Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- How does clinical evidence change value versus wellness apps?
- Who leads, and where is the competitive and patent white space?
- Is the investment case bankable — and under what conditions?
- How does the category align with the SDGs, health equity and evidence-integrity expectations?

## WHY ANMD — THE DIFFERENCE

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*Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability view in a single architecture.*

- **Triangulated sizing** — every market read three ways so value, volume and the physical-unit views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, conditional investment view.

## WHO SHOULD BUY THIS REPORT

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Investors, OEMs, health systems, payers, clinicians, lenders and policymakers, and strategic corporate planners and decision-makers.

### Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at [www.anewmarketdynamics.com](http://www.anewmarketdynamics.com) · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

### Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at [www.anewmarketdynamics.com](http://www.anewmarketdynamics.com). The full detailed table of contents will be sent directly to your registered company email address.