

## **Postoperative Pain Management Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

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### **Report description:**

The postoperative pain management market is expected to register a CAGR of 4.8% over the forecast period (2022-2027).

The COVID-19 pandemic has significantly impacted the postoperative pain management market. For instance, as per a December 2020 published article titled "COVID-19 and its Impact on Pain Management Practices", irrespective of the place of pain practice, 95.2% of physicians reported that their pain practice was affected. As per the same study, physicians reported that fewer patients visited the pain clinic, and fewer interventions were performed. However, with the introduction of vaccines and the uplifting of lockdown restrictions, the number of surgical procedures started to increase gradually, positively impacting the market growth. For instance, as per a January 2021 published study titled, "Postoperative Outcomes in Surgical COVID-19 Patients: A Multicenter Cohort Study", postoperative 30-day mortality in COVID-19 patients undergoing surgery was high (15.9%). As per the same study, although few surgeries were performed on COVID-19 patients, the pandemic impact on surgical activity volume was significant. Such studies indicate the increasing demand for postoperative pain management medications during the COVID-19 pandemic.

Furthermore, the factors fueling the market's growth are the growing number of surgical procedures, rising number of emergency hospital visits, increasing demand for non-opioid-based analgesics, and increasing focus on palliative care.

A growing number of surgical procedures drives the demand for postoperative pain management medications. For instance, as per the research study published in June 2021, titled "German Heart Surgery Report 2020: The Annual Updated Registry of the German Society for Thoracic and Cardiovascular Surgery", a total of 92,809 operations were classified as heart surgery procedures in the classical sense, of which 29,444 were isolated coronary artery bypass grafting procedures, 35,469 were isolated heart valve procedures, and the number of isolated heart transplantations increased by 2% to 340. In addition, according to the Organization for Economic Co-operation and Development (OECD), the estimated number of laparoscopic cholecystectomy

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procedures performed in Italy in 2020 was 61,313 and 118,485 in Turkey. With such an increase in the number of surgeries performed across several countries, the market for postoperative pain management drugs is expected to exhibit substantial growth as these medications play a crucial role in managing the pain caused by surgical procedures.

Likewise, a study titled "Postoperative Pain Management in Enhanced Recovery Pathways" published in PubMed Central in January 2022 stated that, according to United States Institute of Medicine research, postoperative pain is a common but often undertreated disease, with 80 percent of surgery patients experiencing postoperative pain and less than half of these patients reporting appropriate pain control. Furthermore, the study states that, according to a nationwide survey, 39 percent of postoperative patients feel severe to terrible pain. Such unmet needs greatly highlight the need for postoperative pain management drugs to optimize palliative care among the patient population, thereby providing lucrative opportunities to prominent players within the market.

However, concerns about the overuse of opioids are a major factor restraining the market's growth.

#### Post Operative Pain Management Market Trends

##### Non-steroidal anti-inflammatory drugs (NSAIDs) Segment is Expected to Hold a Major Market Share in the Postoperative Pain Management Market

The non-steroidal anti-inflammatory drugs (NSAIDs) segment is expected to hold a significant market share by drug class. Non-steroidal anti-inflammatory drugs (NSAIDs) are widely used to relieve pain, reduce inflammation, and bring down high body temperatures. The major factors fuelling the segment's growth are the implementation of strategic initiatives by the market players, the growing demand for NSAIDs owing to their advantages over other drugs, and the increasing number of surgical procedures. For instance, in July 2021, Hyloris Pharmaceuticals SA, a specialty biopharma company committed to addressing unmet medical needs through reinventing existing medications, reported that Maxigesic IV would be available in Germany and Austria. Maxigesic IV is a novel, patented, non-steroidal anti-inflammatory drug that is a unique combination of 1000 mg paracetamol and 300 mg ibuprofen solution for infusion. Hyloris' partner company, AFT Pharmaceuticals, works with distribution partners with a strong local presence to commercialize the product worldwide.

Moreover, as per a June 2021 published study titled "Managing Postoperative Pain in Adult Outpatients: A Systematic Review and Meta-Analysis Comparing Codeine with NSAIDs," adult outpatients reported better pain scores, better global assessments, and fewer adverse effects when their postoperative pain was treated with NSAIDs than with codeine. Such studies indicating the efficacy of NSAIDs in postoperative pain management contribute to the segment's growth.

Thus, the segment is expected to witness significant growth over the forecast period due to the abovementioned factors.

##### North America is Expected to Hold a Significant Share in the Market and Expected to do Same in the Forecast Period

The United States is expected to hold a major share of the market in North America. The major factors bolstering the market's growth are the growing number of surgical procedures, surge in awareness regarding postoperative pain management drugs, increasing number of product approvals, and rising focus on palliative care.

For instance, a research study titled "Comparison of Postoperative Pain Management Outcomes in the United States and China," published on PubMed.gov in November 2021, stated that the American Pain Society Patient Outcome Questionnaire-Revised (APS-POQ-R) was completed by 244 patients in the United States and 268 patients in China with similar surgery sites. The Pain Management Index (PMI) was calculated on their first postoperative day. Patients in the United States had a higher score on the APS-POQ "perception of pain management" subscale and a larger proportion of acceptable treatment, as assessed by the PMI. In

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patients from both nations, patient education and degrees of pain reduction predicted patient satisfaction with pain management. In the United States, higher compliance with pain management recommendations has resulted in higher perceptions among patients. Such statistics are likely to increase the demand for postoperative pain management medications within the country, thereby boosting the market's growth.

In addition, several market players are engaged in implementing strategic initiatives, thereby contributing to the market's growth. For instance, in May 2021, Allay Therapeutics, a clinical-stage biotechnology company pioneering ultra-sustained analgesic products to transform postsurgical pain management and recovery, reported the first-ever clinical data showing non-opioid pain relief lasting two weeks after a single administration.

Moreover, an increasing number of product approvals is also expected to contribute to the market's growth. For instance, in May 2021, Heron Therapeutics, Inc., a commercial-stage biotechnology company focused on developing treatments to address some of the most important unmet patient needs, reported that the United States Food and Drug Administration (FDA) has approved ZYNRELEF (bupivacaine and meloxicam) extended-release solution for use in adults for soft tissue or periarticular instillation to produce postsurgical analgesia for up to 72 hours after a bunionectomy, open inguinal herniorrhaphy, and total knee arthroplasty.

Thus, owing to the abovementioned factors, the market is expected to witness significant growth over the forecast period.

#### Post Operative Pain Management Market Competitor Analysis

The postoperative pain management market is fragmented, with the presence of several global and international market players. The key players are adopting different growth strategies to enhance their market presence, such as partnerships, agreements, collaborations, new product launches, geographical expansions, mergers, and acquisitions. Some of the key players in the market are Pfizer Inc., AbbVie, GlaxoSmithKline plc, Heron Therapeutics, and AFT Pharmaceuticals.

#### Additional Benefits:

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

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