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Post Operative Pain Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 111 pages | Mordor Intelligence

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Report description:

The Post Operative Pain Management Market size is expected to grow from USD 40.46 billion in 2024 to USD 53.61 billion by 2029, registering a CAGR of 5.79% during the forecast period.

The COVID-19 pandemic significantly impacted the postoperative pain management market. As per the April 2022 data published by PubMed, it was observed that people across the United States and Canada suffering from chronic pain witnessed a significant increase during the pandemic. Similarly, according tc. Similarly, according to the study published in the Turkish Journal of Anaesthesiology and Reanimation in June 2022, most pain care centers are forced to close their doors. All outpatient and interventional procedures were reduced due to the government's strict lockdown. Thus, the pain management market was greatly impacted. However, the market is currently recovering well owing to the resumption of surgical procedures and the decline in COVID-19 cases.

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

A growing number of surgical procedures drives the demand for postoperative pain management medications. For instance, according to the Canadian Institutes of Health Information published in June 2022, in 2021, 55,300 hip and 55,285 knee replacements were performed in Canada. Additionally, according to the Organisation for Economic Co-operation and Development data published in April 2023, the number of hip replacement surgeries increased in Turkey from 41,604 in 2020 to 46,368 in 2021. With such a huge 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 published in PubMed Central in January 2022 stated that, according to research conducted by the United States Institute of Medicine in June 2022, postoperative pain was 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.

Additionally, strategic initiatives by the market players, such as product launches and research and development activities in the field of pain management, are expected to boost the market's growth. For instance, in April 2022, Assiut University started a trial to evaluate the population pharmacokinetics and pharmacodynamics of rectal dexmedetomidine Niosomesfor postoperative analgesia in pediatric cancer patients undergoing bone marrow biopsy and aspiration in comparison with the intravenous and rectal plain formulation. Additionally, in April 2022, Acadia Pharmaceuticals Inc. announced top-line results from a Phase 2 randomized, double-blind, placebo-controlled clinical trial evaluating the efficacy and safety of ACP-044 for acute pain following bunionectomy surgery. The primary endpoint, a comparison of cumulative pain intensity scores over 24 hours between the ACP-044 1600 mg once daily, the ACP-044 400 mg four times daily, and the placebo treatment arms, was not met.

Thus, all aforementioned market, such as the rising number of surgical procedures and strategic initiatives by the market players, is expected to boost the market over the forecast. 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 Significant 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 fueling 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 biopharmaceutical company committed to addressing unmet medical needs through the reinvention of 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 of paracetamol and 300 mg of ibuprofen solution for infusion. Hyloris' partner company, AFT Pharmaceuticals, works with distribution partners with a strong local presence to commercialize the product worldwide.

Moreover, a June 2021 published study titled Adult outpatients reported better pain scores and fewer adverse effects when their postoperative pain was treated with NSAIDs than codeine. Such studies indicating the efficacy of NSAIDs in postoperative pain management contribute to the segment's growth. Additionally, product launches by the market players are expected to propel the market's growth. For instance, in December 2021, Heron Therapeutics, Inc. announced that the U.S. Food and Drug Administration (FDA) has approved its supplemental New Drug Application (sNDA) for ZYNRELEF (bupivacaine and meloxicam) extended-release solution to significantly expand the indication.

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

The increase in the number of surgeries in the country is expected to propel the growth of the market. For instance, the Personalised Orthopaedics of the Palm Beaches statistics published in November 2021 show that almost 800,000 knee replacements are performed each year in the United States, and the number is estimated to increase year on year. Additionally, Cedars-Sinai data updated in January 2022 shows that coronary artery bypass graft surgery (CABG), also known as coronary artery bypass or bypass surgery, is the most common type of heart surgery. More than 300,000 people have successful bypass surgery in the United States each year. 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, The FDA has approved a Heron Therapeutics combination medicine designed to manage postoperative pain and assist patients avoid the use of narcotic painkillers, a regulatory decision that comes after the agency previously rejected the biotech's applications. The Heron medication, which combines bupivacaine and meloxicam, is approved to treat postsurgical pain for up to 72 hours after three procedures: bunionectomy, open surgery hernia repair, and total knee replacement.

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

Post-Operative Pain Management Industry Overview

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:

  The market estimate (ME) sheet in Excel format
 3 months of analyst support

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