

Global Non-opioid Pain Treatment Market Size study, by Drug Class (NSAIDs, Local Anesthetics), by Pain (Chronic Pain, Post-operative Pain), by Route of Administration, by Distribution Channel, and Regional Forecasts 2022–2032

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Abstracts

The Global Non-opioid Pain Treatment Market is valued at approximately USD 42.08 billion in 2023 and is expected to expand at a robust compound annual growth rate (CAGR) of 7.69% over the forecast period from 2024 to 2032. As public health crises surrounding opioid misuse continue to escalate, the healthcare ecosystem has been rigorously shifting towards alternative, safer therapeutic avenues. Non-opioid pain treatments—ranging from NSAIDs to local anesthetics—are fast becoming the backbone of pain management strategies, offering effective relief without the addiction risks associated with opioids. These alternatives are not only addressing chronic and post-operative pain but are also empowering physicians with diverse, targeted solutions across outpatient and inpatient care.

Fueling this paradigm shift are mounting concerns over opioid dependency, coupled with intensified government regulations and awareness campaigns that encourage the prescription of non-addictive medications. Pharmaceutical innovators and biotech companies are funneling investments into novel formulations, extended-release mechanisms, and combination therapies that align with the push for responsible pain care. Innovations in topical agents, transdermal patches, and even injectable anesthetics are offering customizable pain management pathways, enhancing patient compliance and clinical outcomes. At the same time, regulatory fast-tracking and reimbursement expansion in several countries are boosting market accessibility and expediting new product launches.

Non-opioid drugs are being meticulously developed to address both chronic and acute forms of pain across a variety of clinical scenarios. NSAIDs remain a mainstay, widely used for their anti-inflammatory and analgesic properties, particularly in musculoskeletal and arthritic conditions. Local anesthetics are surging in popularity for their precision-targeted nerve blockade capabilities, especially in surgical and dental procedures. These treatments are being administered through oral, intravenous, topical, and other delivery systems, offering clinicians flexibility in aligning treatments with patient-specific conditions and tolerability profiles.

North America currently dominates the global non-opioid pain treatment market due to its advanced regulatory framework, high awareness levels, and swift adoption of non-opioid prescriptions post opioid epidemic mandates. Europe trails closely behind, supported by favorable healthcare reimbursement policies and collaborative research initiatives across countries. Meanwhile, the Asia Pacific region is emerging as a lucrative frontier, driven by rising healthcare expenditure, increasing awareness of non-opioid alternatives, and growing burden of chronic diseases. Nations like China, Japan, and India are progressively integrating non-opioid therapeutics into standard medical practice, supported by regional manufacturers and global partnerships.

Major market player included in this report are:

Teva Pharmaceutical Industries Ltd.

GlaxoSmithKline plc

Pfizer Inc.

Sanofi S.A.

Bayer AG

Eli Lilly and Company

Novartis AG

Johnson & Johnson

Abbott Laboratories

Mallinckrodt Pharmaceuticals

Endo International plc

Astellas Pharma Inc.

Assertio Holdings, Inc.

Alembic Pharmaceuticals Limited

Dr. Reddy's Laboratories Ltd.

The detailed segments and sub-segment of the market are explained below:

By Drug Class:

NSAIDs

Local Anesthetics

By Pain Type:

Chronic Pain

Post-operative Pain

By Route of Administration:

Oral

Parenteral

Topical

Others

By Distribution Channel:

Hospital Pharmacies

Retail Pharmacies

Online Pharmacies

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Rest of Latin America

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

Years considered for the study are as follows:

Historical year – 2022

Base year – 2023

Forecast period – 2024 to 2032

Key Takeaways:

Market Estimates & Forecast for 10 years from 2022 to 2032.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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