

Non-opioid Pain Patch Market Opportunity, Growth Drivers, Industry Trend Analysis, and Forecast 2024 – 2032

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Abstracts

The Global Non-opioid Pain Patch Market reached USD 828.3 million in 2023 and is projected to grow at a CAGR of 6.6% from 2024 to 2032. Non-opioid pain patches are transdermic devices designed to deliver medication directly through the skin, providing targeted pain relief without the risks associated with opioids. Effective in managing chronic, neuropathic, musculoskeletal, and post-surgical pain, these patches offer a safe alternative to opioid medications, addressing the need for non-addictive, effective pain management solutions. The market is propelled by increasing research and development in pain management, including initiatives like the NIH Heal Initiative, which focuses on advancing chronic pain treatment and reducing opioid use disorder (OUD) and overdose rates. Such programs are fostering the development of safer, opioid-free treatments, significantly boosting the demand for non-opioid pain patches.

Product-wise, the market includes lidocaine, diclofenac, methyl salicylate, capsaicin, ketoprofen, and other pain-relief patches. The lidocaine segment led the market in 2023 with revenues of USD 357 million, showing strong growth potential due to the escalating interest in opioid alternatives. The high rates of addiction and fatalities linked to opioid medications have pushed healthcare providers and patients toward safer options like lidocaine patches, which deliver localized pain relief without addiction risks. Regarding therapeutic application, the non-opioid pain patch market from the Chronic pain management held a significant 42.4% market share in 2023 and is expected to see notable growth.

Non-opioid patches have proven effective in managing chronic pain, often comparable to oral medications, with the added advantage of continuous, localized relief. Clinical studies underscore their utility, prompting greater adoption for long-term pain

management. U.S. dominated the market, generating USD 244.3 million in revenue in 2023, and is anticipated to experience strong growth. Government regulations on opioid prescriptions, including FDA guidelines promoting non-opioid options, have fueled demand for pain patches containing lidocaine, diclofenac, and capsaicin for both chronic and acute pain.

Additionally, the U.S. has a growing elderly population, which experiences higher rates of musculoskeletal conditions, chronic joint pain, and arthritis—further driving the need for non-opioid pain management solutions.

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