

Pain Management Devices – A Global Market Overview

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Abstracts

Pain Management Devices Market Trends and Outlook

Pain management devices are designed to relieve both acute and chronic pain through non-invasive or minimally invasive methods, thereby decreasing the need for medications or surgery. These devices utilize various methods, including electrical impulses, temperature extremes, or magnetic fields, to address conditions such as cancer-related pain, neuropathic pain, musculoskeletal pain, facial pain, migraines, back pain, and many others. The pain management devices include neuromodulation and neurostimulation devices, electrical stimulators, ablation devices, and analgesic Infusion pumps. Neuromodulation and neurostimulation devices, such as spinal cord stimulators (SCS), deep brain stimulators (DBS), and vagus nerve stimulators, apply electrical impulses to disrupt pain signals. Electrical stimulators, such as TENS and NMES, offer pain relief by sending electrical currents to the skin or muscles, while ablation devices like radiofrequency and cryoablation target and eliminate tissues that cause pain. Furthermore, analgesic Infusion pumps provide controlled amounts of medication directly to the area experiencing pain.

The global market for Pain Management Devices is estimated at US\$5.1 billion in 2024 and is anticipated to post a CAGR of 8.4% during the 2024-2030 analysis period and stand at a projected US\$8.3 billion by 2030.

The pain management devices market is primarily driven by the rising incidence of chronic diseases, such as cancer and heart disease, which often lead to severe pain and increased demand for effective pain management solutions. The rise in surgical procedures further propels this market, as these devices are essential for providing anesthesia, controlling pain during and after surgery, and facilitating faster recovery.

The aging population, who are more vulnerable to chronic pain and surgical procedures, further boosts the demand for these devices. Growing awareness among consumers regarding pain management devices and technological advancements improve both the efficacy and availability of these solutions, resulting in better usage in treating conditions such as cancer pain, arthritis, and neuropathic pain. The pain rehabilitation centers and government initiatives to improve pain management options further contribute to market growth.

Pain Management Devices Regional Market Analysis

North America leads the global pain management devices market, cornering the share of 47.9% in 2024, driven by the rapid adoption of devices, rising per capita income, and increasing demand for drug-free therapies during a rising prevalence of chronic pain conditions. This region's market growth is supported by high rates of chronic diseases, a rising geriatric population, established vendors, and favorable reimbursement policies. In contrast, the Asia-Pacific region is projected to be the fastest growing market with a CAGR of 9.8% during the analysis period 2024-2030, fueled by developing healthcare infrastructure, increasing awareness of electrical stimulation techniques, and the penetration of established market players, with India and China poised for the fastest growth due to large patient populations and heightened demand for modern medical facilities.

Pain Management Devices Market Analysis by Type

The neuromodulation and neurostimulation devices segment is expected to hold a 41.8% market share in 2024, leading the pain management devices market due to clinical validations, an increase in chronic pain disorders, a rise in neurological disorders, an aging population, and a preference for minimally invasive alternatives to traditional surgery. Techniques like spinal cord and peripheral nerve stimulation effectively treat conditions such as neuropathic pain and fibromyalgia, enhancing patients' quality of life while reducing opioid dependence. On the other hand, the ablation devices segment is expected to record the fastest CAGR of 9.2% during the forecast period 2024-2030, driven by their use in pain management and oncology, especially for patients with multiple tumors. Among the various types of ablation devices, radiofrequency ablation is expected to demonstrate the most rapid growth due to its efficacy in managing chronic pain and its widespread application in surgical oncology and other medical areas.

Pain Management Devices Market Analysis by Application

The neuropathic pain segment leads the pain management devices application market in 2024, with an estimated 29.7% market share, driven by an increasing incidence of conditions such as diabetes, HIV, multiple sclerosis, and cancer, along with advancements in pain management technology. Neuropathic pain is a chronic disorder resulting from somatosensory nervous system injury, necessitating effective treatments like spinal cord stimulation and peripheral nerve stimulation. Increased industry initiatives and the demand for effective pain management options further bolster this segment's dominance. Meanwhile, the cancer pain segment is projected to grow at the fastest CAGR of 9.1% during the 2024-2030 analysis period, fueled by the rising number of cancer patients and the need for devices to alleviate pain associated with nerve compression from tumors, including cases of genetic disorders like Acute Lymphoblastic Leukemia (ALL).

Pain Management Devices Market Analysis by End-User

The Hospitals & Clinics segment is the largest end-user market in pain management devices, accounting for a share of 51.2% in 2024 due to the increasing use of pain management devices for various conditions and an emphasis on handling post-surgical pain. On the other hand, the Homecare segment is anticipated to experience rapid growth, with a CAGR of 9.6% from 2024 to 2030, fueled by the increasing occurrence of chronic diseases, an aging population, and technological advancements. Patients opt to manage pain at home for convenience and privacy, using easy-to-use devices such as TENS units, which decrease healthcare costs linked to frequent hospital visits.

Pain Management Devices Market Report Scope

This global report on Pain Management Devices analyzes the market based on type, application, and end-users. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics

Historical Period: 2021-2023

Base Year: 2023

Forecast Period: 2024-2030

Units: Value market in US\$

Companies Mentioned: 15+

Pain Management Devices Market by Geographic Region

North America (The United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Italy, Spain, and Rest of Europe)

Asia-Pacific (Japan, China, India, South Korea, and Rest of Asia-Pacific)

South America (Brazil, Argentina, and Rest of South America)

Rest of World

Pain Management Devices Market by Type

Neuromodulation & Neurostimulation Devices

Ablation Devices

Analgesic Infusion Pumps

Electrical Stimulation Devices

Pain Management Devices Market by Application

Neuropathic Pain

Musculoskeletal Pain

Cancer Pain

Facial & Migraine Pain

Other Applications (Including Brain, Trauma, Menstrual Pain, Postoperative Pain, Pediatric Pain, Geriatric Pain and others)

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Hospitals and Clinics

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Home Care Settings

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Analgesic Infusion Pumps

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Rehabilitation Centers

Home Care Settings

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Avanos Medical, Inc.

B. Braun Melsungen AG.

Baxter International Inc.

Becton, Dickinson and Company (BD)

Boston Scientific Corporation

Enovis Corporation

ICU Medical, Inc.

Johnson & Johnson

Kimberly-Clark Corporation

LivaNova, plc

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