

# **Analgesics Market Report by Type (Prescription, Over-The-Counter (OTC)), Drug Class (Opioids, NSAIDs, and Others), Route of Administration (Oral, Parenteral, Topical, Transdermal, Rectal), Pain Type (Musculoskeletal, Surgical and Trauma, Cancer, Neuropathic, Migraine, Obstetrical, Fibromyalgia, Pain due to Burns, Dental/Facial, Pediatric, and Others), Application (Internal, External), and Region 2024-2032**

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## **Abstracts**

The global analgesics market size reached US\$ 54.1 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 77.2 Billion by 2032, exhibiting a growth rate (CAGR) of 3.9% during 2024-2032. The escalating demand for over-the-counter (OTC) medicines, the development of novel analgesic drugs and delivery methods, and the growing incidences of chronic ailments such as arthritis, and migraines are some of the major factors propelling the market.

Analgesics are substances or medications primarily developed to alleviate pain and discomfort. It works by targeting the nervous system to reduce the perception of pain without addressing the underlying cause. It can be classified into non-steroidal anti-inflammatory drugs (NSAIDs), opioids, and non-opioids. Additionally, NSAIDs, including ibuprofen and aspirin, reduce pain by mitigating inflammation. Opioids, such as morphine and codeine, act on the central nervous system to provide more potent pain relief, which can have addictive potential. As a result, the growing popularity of non-opioid analgesics, including acetaminophen, offers pain relief without the addictive risks of opioids.

The market is driven by increasing incidences of pain-related conditions and a growing awareness of the importance of pain management. In addition, the prevalence of chronic ailments, including cancer, diabetes, and cardiovascular diseases, often come with chronic pain as a symptom, requiring the use of analgesics for relief, thus influencing market growth. Moreover, advances in medical technology led to more surgical interventions and post-operative pain management, leading to the use of analgesics in hospitals and clinics, representing another major growth-inducing factor. Besides this, the growing geriatric population is prone to chronic pain conditions such as arthritis and musculoskeletal disorders, which is accelerating the product demand. Along with this, sedentary lifestyles, poor posture, and increased stress levels contribute to increasing pain complaints, resulting in individuals seeking over-the-counter medicines for relief from headaches, back pain, and muscle aches, propelling the market growth.

#### Analgesics Market Trends/Drivers:

The growing incidences of chronic ailments

The market is driven by the prevalence of chronic ailments such as arthritis, and migraines. In addition, the growing geriatric population is more susceptible to chronic health conditions such as arthritis, osteoarthritis, and rheumatoid arthritis which are often characterized by persistent joint pain and inflammation, requiring the use of analgesics for pain management, is influencing the market growth. Moreover, the rising incidence of chronic diseases including diabetes, cardiovascular disorders, and cancer are escalating the demand for pain relief solutions, representing another major growth-inducing factor. Many of these diseases are associated with painful symptoms or side effects of treatments, making analgesics an essential component of the management and palliative care strategies. Furthermore, lifestyle changes are contributing to the surge in chronic ailments, sedentary lifestyles, poor dietary habits, and high-stress levels linked to conditions such as chronic back pain, migraines, and fibromyalgia, resulting in the adoption of analgesics to alleviate their discomfort and enhance their quality of life, are creating a positive market outlook.

The development of novel analgesic drugs and delivery methods

The market has witnessed significant advancements in recent years, particularly in the development of novel drugs and innovative delivery methods. These advancements are essential in reshaping the landscape. In addition, pharmaceutical companies are investing in research and development (R&D) to create novel drugs developed to be more effective in providing pain relief while minimizing side effects, influencing market

growth. They often target specific pain pathways in the body, offering a more tailored approach to pain management. Moreover, advances in genetics and pharmacogenomics allowed for personalized pain management., and healthcare providers consider a patient's genetic makeup when prescribing medicines, ensuring a more tailored and effective treatment approach, representing another major growth-inducing factor. Along with this, several innovative delivery methods, including transdermal patches, intravenous infusions, and subcutaneous injections offer alternative ways to administer analgesics that can provide controlled, sustained pain relief and improve patient compliance, propelling the market growth.

### Escalating demand for over-the-counter (OTC) medicines

The market expansion is due to growing the over-the-counter (OTC) segment. In addition, consumers are becoming more proactive in managing their health and seek convenience and accessibility when it comes to addressing common ailments including headaches, muscle pain, or minor injuries, thus influencing the market growth. Moreover, the growing pharmacies and retail outlets are expanding their OTC analgesic offerings, making these products more accessible to consumers including several brands and formulations, catering to different pain relief needs, representing another major growth-inducing factor. Besides this, the growing awareness of OTC drugs' safety, effectiveness, proper use, and potential side effects, has built trust in these products, thus accelerating the market growth. Along with this, modern lifestyles involve hectic schedules and stress, leading to increased instances of headaches and body aches resulting in the adoption of OTC analgesics, with their ease of purchase and use becoming a go-to choice for individuals seeking quick relief from these everyday discomforts.

### Analgesics Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global and regional levels from 2024-2032. Our report has categorized the market based on type, drug class, route of administration, pain type and application.

### Breakup by Type:

Prescription

Over the counter (OTC)

Prescription analgesics represent the most popular type

The report has provided a detailed breakup and analysis of the market based on the type. This includes prescription, over-the-counter (OTC). According to the report, prescriptions accounted for the largest market share.

The prescription analgesics market is typically dispensed under the supervision of a healthcare professional. It offers a higher level of efficacy and potency compared to its over-the-counter (OTC) counterparts which are often recommended for patients experiencing severe or chronic pain. This effectiveness makes them a preferred choice for healthcare providers when managing pain associated with conditions including post-surgical recovery, cancer, and advanced musculoskeletal disorders.

Moreover, it includes numerous drug classes, allowing healthcare practitioners to tailor treatment to the specific needs of individual patients, thus representing another major growth-inducing factor. It includes opioids, nonsteroidal anti-inflammatory drugs (NSAIDs), and adjuvant medications, each addressing different types and levels of pain.

Besides this, the rising importance of proper dosage and monitoring by healthcare professionals to minimize the risk of misuse, addiction, and adverse side effects, particularly concerning opioids is accelerating the market growth.

Additionally, the growing geriatric population is contributing to the escalating demand for prescription analgesics to experience chronic pain conditions, requiring specialized pain management that often involves prescription medications is propelling the market growth.

Breakup by Drug Class:

Opioids

NSAID

Others

Opioids hold the largest share of the market

A detailed breakup and analysis of the market based on the drug class has also been provided in the report. This includes opioids, NSAID, and others. According to the report, opioids accounted for the largest market share.

Opioids are a class of potent pain-relieving medications that act on the body's opioid

receptors, providing effective relief from moderate to severe pain. In addition, opioids are employed to manage pain and are effective for severe pain, such as that experienced post-surgery, during cancer treatment, or in cases of chronic pain conditions, influencing the market growth. This effectiveness has made opioids a preferred choice for healthcare professionals and patients seeking relief from intense pain.

Moreover, opioids are used in pain management, with some formulations dating back centuries. While concerns about addiction and misuse exist, proper medical supervision and stringent prescription regulations helped curb these risks.

Additionally, the development of extended-release formulations that provide prolonged pain relief expanded the range of conditions for which opioids can be prescribed safely and effectively, thus augmenting the market growth.

Furthermore, the prevalence of chronic pain conditions, such as osteoarthritis and lower back pain is escalating the demand for opioids due to the growing geriatric population and as the burden of chronic pain, which is propelling the market growth.

Breakup by Route of Administration:

- Oral
- Parenteral
- Topical
- Transdermal
- Rectal

Oral presently accounts for the largest market share

A detailed breakup and analysis of the market based on the route of administration has also been provided in the report. This includes oral, parenteral, topical, transdermal, and rectal. According to the report, oral accounted for the largest market share.

The oral route of administration established itself as the dominant choice in the global market. In addition, the increasing use of oral analgesics offers convenience and ease of use that are available in various forms, including tablets, capsules, and liquids, making them accessible to numerous patients, and influencing the market growth. This versatility in dosage forms allows healthcare providers to tailor pain relief regimens to individual patient needs, enhancing patient compliance.

Moreover, oral medications are familiar among healthcare professionals and patients employed for numerous health conditions which fosters trust and confidence in the effectiveness of these medications, representing another major growth-inducing factor.

Besides this, the oral route provides a reliable and consistent absorption profile with a predictable absorption pattern, and ensures consistent pain relief for patients, accelerating the market growth.

Furthermore, the wide range of oral medications available, from over-the-counter (OTC) products to prescription medications, cater to various pain management needs are propelling the market growth.

Breakup by Pain Type:

- Musculoskeletal
- Surgical and Trauma
- Cancer
- Neuropathic
- Migraine
- Obstetrical
- Fibromyalgia
- Pain due to Burns
- Dental/Facial
- Pediatric
- Others

Musculoskeletal pain dominates the market

A detailed breakup and analysis of the market based on the pain type has also been provided in the report. This includes musculoskeletal, surgical and trauma, cancer, neuropathic, migraine, obstetrical, fibromyalgia, pain due to burns, dental/facial, pediatric, and others. According to the report, musculoskeletal pain accounted for the largest market share.

Musculoskeletal pain includes numerous conditions affecting the muscles, bones, tendons, ligaments, and joints. It includes ailments such as osteoarthritis, rheumatoid arthritis, back pain, and sports-related injuries, among others.

Besides this, the growing geriatric population is susceptible to musculoskeletal pain due to the natural degeneration of joints and tissues. This shift led to a substantial increase in the prevalence of conditions including osteoarthritis, which often requires pain management solutions.

Apart from this, sedentary lifestyles, lack of physical activity, and poor ergonomics in work environments contribute to musculoskeletal issues. Individuals working long hours at desks or engaging in repetitive tasks are more susceptible to conditions including chronic back pain and carpal tunnel syndrome, driving the demand for medications.

Breakup by Application:

Internal  
External

A detailed breakup and analysis of the market based on the application has also been provided in the report. This includes internal and external.

Internal application of analgesics involves the ingestion or injection of pain-relief medications which includes oral tablets, capsules, liquids, and injectable forms. It is developed to provide systemic relief by acting on the central nervous system, making it suitable for various pain types, including headaches, post-surgical pain, and systemic conditions.

External application of analgesics involves the use of topical formulations, such as creams, gels, patches, and ointments, applied directly to the skin at the site of pain. These products are designed to provide localized relief, making them particularly effective for musculoskeletal pain, joint pain, and surface injuries. It is gaining traction in the market due to its non-invasive nature, reduced risk of systemic side effects, and ease of use. Additionally, they are preferred by individuals seeking targeted pain relief without affecting the entire body.

Breakup by Region:

Asia Pacific  
North America  
Europe  
Middle East and Africa  
Latin America

North America leads the market, accounting for the majority of the analgesics market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include Asia Pacific, North America, Europe, Latin America, and the Middle East and Africa. According to the report, North America accounted for the largest market share.

The North America market is driven by the growing healthcare infrastructure and rising healthcare expenditure. The United States boasts advanced medical facilities, a well-established pharmaceutical industry, and a strong emphasis on pain management to create a conducive environment for the development, manufacturing, and distribution of analgesic products.

Additionally, the prevalence of chronic pain conditions in the region is augmenting the market growth. Also, chronic pain affects millions of individuals across North America, with ailments including chronic lower back pain, osteoarthritis, and neuropathic pain being common which requires a consistent demand for medications and treatments, thus propelling the market growth.

Furthermore, the proactive approach to pain management and the promotion of pain relief options contribute to market domination. Healthcare professionals in the region are actively advocating for patient access to pain relief, and this awareness is further escalating the demand for medications.

#### Competitive Landscape:

At present, key players in the market are implementing various strategies to strengthen their positions and stay competitive in this dynamic industry. These strategies are driven by the need to address evolving consumer preferences, regulatory changes, and market trends. They are allocating substantial resources to research and develop (R&D) new drugs and formulations that offer improved pain relief, reduce side effects, and enhance patient compliance. It also focuses on exploring non-opioid alternatives to address concerns about opioid addiction and misuse. Moreover, companies are expanding their product portfolios by acquiring or partnering with smaller firms specializing in complementary pain management solutions which allows them to offer a wider range of medications, including over-the-counter (OTC) and prescription medications, topical creams, and medical devices. Besides this, key players are helping companies establish a strong presence in the market by collaborating with healthcare professionals



to educate patients and providers about the benefits of their products.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Bayer AG  
Novartis International AG  
GlaxoSmithKline PLC  
Pfizer Inc.  
Johnson & Johnson Pvt. Ltd.  
Reckitt Benckiser (RB) Group PLC  
Endo Pharmaceuticals PLC  
Bristol-Myers Squibb Company  
Eli Lilly and Company  
Sanofi SA

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

#### Recent Developments:

In January 2021, Pfizer collaborated with Premier, an American healthcare improvement company that would offer five essential medications to healthcare practitioners to help them fulfill the long-term and immediate demands for medications essential to numerous patient care interventions.

In March 2020, Eli Lilly and Company teamed up with Pfizer, an American multinational pharmaceutical and biotechnology corporation to increase their efforts for the US FDA approval for a Biologics License Application for its tanezumab 2.5 administered subcutaneously for patients with chronic pain.

#### Key Questions Answered in This Report

1. What was the size of the global analgesics market in 2023?
2. What is the expected growth rate of the global analgesics market during 2024-2032?
3. What has been the impact of COVID-19 on the global analgesics market?
4. What are the key factors driving the global analgesics market?
5. What is the breakup of the global analgesics market based on the type?
6. What is the breakup of the global analgesics market based on the drug class?
7. What is the breakup of the global analgesics market based on the route of administration?

8. What is the breakup of the global analgesics market based on the pain type?
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10. What are the key regions in the global analgesics market?
11. Who are the key players/companies in the global analgesics market?

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