

# **Opioids Market Report by Product Type (Codeine, Fentanyl, Methadone, Oxycodone, Morphine, Hydrocodone), Application (Pain Management, Cough Treatment, Diarrhea Treatment, and Others), Distribution Channel (Hospital Pharmacies, Retail Pharmacies, Drug Stores, Online Stores, and Others), and Region 2023-2028**

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## **Abstracts**

The global opioids market size reached US\$ 21.2 Billion in 2022. Looking forward, IMARC Group expects the market to reach US\$ 25.6 Billion by 2028, exhibiting a growth rate (CAGR) of 3.19% during 2022-2028. The rising incidence of chronic pain conditions, expanding elderly population, increase in cancer diagnoses, improved access to healthcare services, ongoing research and development (R&D) efforts, escalating consumer awareness, and favorable government regulations are some of the major factors propelling the market.

Opioids, also known as narcotics, are a class of powerful pain-relieving medications derived from the opium poppy plant or synthesized in laboratories. These substances act on specific receptors in the brain and spinal cord, primarily the mu-opioid receptors, to alleviate pain and induce a sense of euphoria. Opioids can be classified into two main categories including, prescription opioids, which are legally prescribed by healthcare professionals to manage severe pain, and illicit opioids like heroin, which are obtained and used without medical supervision. The most common prescription opioids include oxycodone, hydrocodone, and fentanyl.

The expanding prevalence of chronic pain conditions, including cancer-related pain and musculoskeletal disorders, is a key driving factor necessitating the prescription of

opioids for the management of severe and persistent pain. In addition to this, the global demographic shift towards an aging population is contributing to the increasing demand for opioids, as elderly individuals frequently experience age-related ailments and pain. Moreover, opioids are commonly used in post-operative pain management, consequently the significant surge in surgical procedures worldwide is boosting the demand for these medications, thereby aiding in market expansion. Besides this, the increase in cancer diagnoses, especially in developing countries, is fueling the adoption of opioids to manage cancer-related pain. Furthermore, improved access to healthcare services in emerging markets is leading to higher prescription rates for opioids as healthcare providers aim to address pain management needs, thus impelling the market growth.

#### Opioids Market Trends/Drivers:

##### Increasing prevalence of chronic pain

The escalating prevalence of chronic pain across the globe represents a significant growth-inducing driver of the opioids market. Chronic pain, often resulting from conditions such as arthritis, back problems, or neuropathic disorders, affects millions of individuals, necessitating effective pain management solutions. Opioids are widely prescribed by healthcare practitioners due to their potency in alleviating severe pain. Concurrent with this, as the population ages and life expectancy rises, the incidence of chronic pain is also expected to grow, propelling the demand for opioids. Besides this, improved diagnosis and awareness of pain-related disorders are prompting pharmaceutical companies to invest in research and development (R&D) to create innovative opioid formulations with enhanced safety profiles, further driving the market's expansion.

##### Aging population

The global demographic shift toward an aging population is another key driver of the opioids market. Elderly individuals often experience age-related ailments, including degenerative joint diseases and cancer, leading to increased instances of chronic pain, which, in turn, is fueling the demand for pain management options, such as opioids. Opioids, despite their potential side effects and risks, remain a commonly prescribed option for managing moderate to severe pain in this demographic. Healthcare providers often resort to opioids when other pain management strategies prove inadequate. This sustained demand has strengthened the opioid market, as pharmaceutical companies develop new formulations and delivery methods to cater to the specific needs of the aging population.

## Rising cancer rates across the globe

The increasing incidence of cancer diagnoses, particularly in emerging markets, is contributing to the surging demand for opioids. Cancer often presents severe pain as a common symptom, and opioids are a cornerstone of cancer pain management. As cancer rates continue to rise globally, so does the demand for effective pain relief measures, fueling the opioid market's growth. Moreover, improved access to healthcare services is leading to earlier cancer diagnosis and treatment, necessitating the use of opioids for pain management. Pharmaceutical companies are responding to this demand by developing specialized opioid formulations designed to cater to the unique pain profiles of cancer patients, further solidifying the role of opioids in cancer care and driving market expansion.

### Opioids Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global opioids market report, along with forecasts at the global, regional and country levels from 2023-2028. Our report has categorized the market based on product type, application and distribution channel.

### Breakup by Product Type:

- Codeine
- Fentanyl
- Methadone
- Oxycodone
- Morphine
- Hydrocodone

Oxycodone holds the largest share in the market

The report has provided a detailed breakup and analysis of the market based on the product type. This includes codeine, fentanyl, methadone, oxycodone, morphine, and hydrocodone. According to the report, oxycodone represented the largest segment.

Oxycodone has emerged as a dominant product type in the opioids market for owing to its potent pain-relieving properties which make it highly effective in managing severe pain, including post-operative and cancer-related pain. Physicians often prescribe oxycodone when other pain management options prove insufficient. Moreover, the

pharmaceutical industry has invested significantly in the development of extended-release formulations of oxycodone, offering prolonged pain relief with fewer dosing intervals. This convenience factor has contributed to its widespread use. Additionally, oxycodone's versatility allows for various administration routes, including oral tablets, capsules, and intravenous formulations, catering to diverse patient needs, which, in turn, is impelling its adoption. Moreover, the familiarity of healthcare providers with oxycodone's efficacy and safety profile has led to its continued use as a primary option for pain management, creating a positive outlook for market growth.

#### Breakup by Application:

- Pain Management
- Cough Treatment
- Diarrhea Treatment
- Others

Pain management holds the largest share in the market

A detailed breakup and analysis of the market based on the application has also been provided in the report. This includes pain management, cough treatment, diarrhea treatment, and others. According to the report, pain management accounted for the largest market share.

Opioid's fundamental role in healthcare sector and the increasing recognition of the importance of effectively addressing pain is fueling its adoption in pain management applications. Pain is a pervasive and complex medical issue affecting millions of individuals worldwide, and opioids are considered a crucial component in managing moderate to severe pain, especially in acute and chronic pain conditions, post-surgical recovery, and cancer-related pain. The sheer prevalence of pain-related conditions owing to the growing geriatric population, and the rising incidence of cancer diagnoses have created a sustained demand for effective pain relief methods, such as opioids, thereby bolstering the market growth. In addition to this, the medical community's commitment to improving the quality of life for patients has led to a growing emphasis on personalized pain management plans, where opioids are often a key element, thus, underscoring its dominance in the application segment.

#### Breakup by Distribution Channel:

- Hospital Pharmacies

Retail Pharmacies  
Drug Stores  
Online Stores  
Others

The report has provided a detailed breakup and analysis of the market based on the distribution channel. This includes hospital pharmacies, retail pharmacies, drug stores, online stores, and others.

The rise in prevalence of chronic pain conditions, such as osteoarthritis and lower back pain, has led to a surge in the prescription and purchase of opioid medications through retail pharmacies and drug stores, strengthening the market growth.

Additionally, the growing awareness and advocacy for pain management prompting healthcare providers to prescribe opioids for acute pain, often obtained through hospital pharmacies is influencing the market's growth.

Furthermore, the convenience of online shopping and the proliferation of online pharmacies has made opioids more accessible, contributing to increased product demand. The global opioids market is driven by the need for stringent regulations, enhanced educational efforts, and responsible prescribing practices across all distribution channels to strike a balance between meeting patients' pain relief needs and safeguarding public health.

Breakup by Region:

North America  
United States  
Canada  
Asia-Pacific  
China  
Japan  
India  
South Korea  
Australia  
Indonesia  
Others  
Europe  
Germany

France  
United Kingdom  
Italy  
Spain  
Russia  
Others  
Latin America  
Brazil  
Mexico  
Others  
Middle East and Africa

North America exhibits a clear dominance, accounting for the largest opioids market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

The North American opioids market has experienced substantial growth due to several factors, including a high prevalence of chronic pain conditions, such as back pain and osteoarthritis, an aging population, and the widespread use of opioids in pain management. In addition to this, improved healthcare infrastructure and increased awareness of pain management options have led to higher opioid prescription rates, positively impacting the market growth. Moreover, the opioid epidemic, characterized by high rates of addiction and overdose deaths, has spurred growth through the increased use of medications such as buprenorphine and methadone for addiction treatment and harm reduction. Specialized addiction treatment centers and pharmacies have emerged as distribution channels, addressing the demand for these medications. Furthermore, evolving regulations and prescribing practices, influenced by stricter guidelines and prescription monitoring programs are influencing the market growth.

#### Competitive Landscape:

Leading pharmaceutical companies are investing heavily in R&D to develop innovative opioid formulations. These efforts focus on creating opioids with improved safety profiles, reduced potential for abuse, and enhanced efficacy in pain management. The

goal is to provide healthcare professionals with more effective and safer treatment options. Moreover, opioid manufacturers are closely monitoring and complying with evolving regulations and guidelines related to opioid prescribing, distribution, and usage. They are working to ensure that their products meet the highest safety and quality standards while adhering to stringent regulatory requirements. All these efforts are shaping the future of the opioids market.

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

Boehringer Ingelheim International GmbH  
Hikma Pharmaceuticals PLC  
Mallinckrodt plc  
Pfizer Inc.  
Purdue Pharma L.P.  
Sanofi S.A.  
Sun Pharmaceutical Industries Ltd.  
Teva Pharmaceutical Industries Ltd.

#### Recent Developments:

In June 2021, the U.S. FDA accepted and granted priority review designation to new drug application (NDA) submitted by Purdue Pharma L.P. for nalmefene hydrochloride injection. Nalmefene injectable is an opioid antagonist designed to reverse opioid overdose.

In November 2022, Teva announced a novel partnership with Rimidi to broaden the respiratory digital health platform's impact.

#### Key Questions Answered in This Report:

How has the global opioids market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global opioids market?

What is the impact of each driver, restraint, and opportunity on the global opioids market?

What are the key regional markets?

Which countries represent the most attractive opioids market?

What is the breakup of the market based on the product type?

Which is the most attractive product type in the opioids market?

What is the breakup of the market based on application?



Which is the most attractive application in the opioids market?  
What is the breakup of the market based on distribution channel?  
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