

The World Market for Pain Management Drugs and Devices

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Abstracts

The World Market for Pain Management Drugs and Devices encompasses a wide variety of products that treat and ease pain. The field of pain management is currently experiencing a busy and interesting period; and as a result, the range of therapeutic options available to physicians and other clinicians has expanded. Solutions to pain disorders are still elusive but continued human and animal studies will help to further identify the biochemical and neurophysiological factors that influence pain. The future of pain management will likely involve multidisciplinary departments dedicated to finding treatments that manage pain. The need is great worldwide for management of pain and there are still many facets of pain management that need to be explored.

Faced with intensifying competition and increasingly price sensitive markets, manufacturers in the area of pain management therapeutics are trying to differentiate their products to avoid price competition and to increase profits. However, there are a number of issues and trends that have a direct influence on this market and the manufacturer's ability to successfully operate in the market. A keen awareness of all facets of the industry including barriers will enable manufacturers to effectively challenge these issues and formulate plans to reduce or eliminate barriers in the treatment of pain.

The driving forces for this market include growth and aging of the global population, new products and technology, and increasing interest in multidisciplinary approaches to pain management.

This report, The World Market for Pain Management Drugs and Devices, provides market estimates and forecasts for the following therapeutic categories:



Burn Pain

Cancer Pain

Dental/Facial Pain

Migraine Headache Pain

Musculoskeletal Pain

Neuropathic Pain

Obstetrical Pain

Pediatric Pain

Surgical and Trauma Pain

This report details the various categories of top prescription pain management drugs, describes U.S., European, Japanese and other markets in each of the specific pain areas. The report also covers drug delivery methods, pain management devices, and alternate treatment modalities that are influencing the market. It further identifies major market factors, which are discussed, and a total market summary is presented.

The information and analysis presented in this report are based on extensive interviews with senior management of top companies and conference participants (business and clinical) in the pain management market. Background information was obtained from a comprehensive search of published literature and reports obtained from various government, business, medical trade, and international journals. Key information from published literature was used to conduct interviews with over 45 industry executives and product managers to validate and obtain expert opinion on current and future trends in the pain management market. Interviews were also used to confirm and/or adjust market size estimates, as well as in formulating market projections.

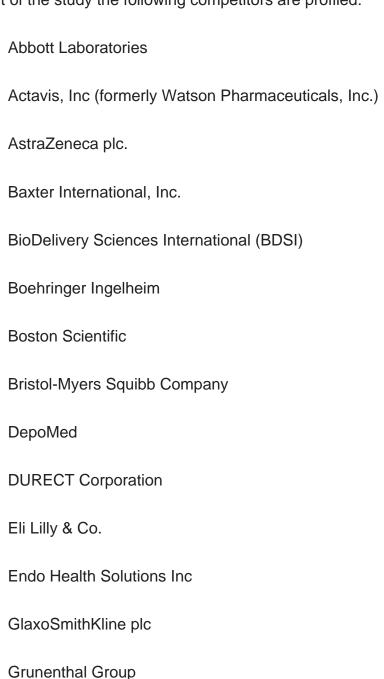
All market data pertain to the world market at the manufacturers' level. Data are expressed in current U.S. dollars. The base year for data was 2012. Historical data is provided for 2010 and 2011, and forecast data are provided for each of the years 2012 through 2017. Historical, base year, and forecast data are provided for each market



segment. Market shares are provided for each market segment for the 2012 base year.

Top product revenues are considered for the report in each subsegment according to treatment use. Top products in each category represent approximately 80% of the total revenues for each subsegment. The total market reflects the total revenues of all top products in all of the individual categories, representing approximately 80%-90% of the total prescription pain management pharmaceuticals and pain management devices.

As part of the study the following competitors are profiled:



Medtronic, Inc.



Merck & Co.
Novartis
Pain Therapeutics, Inc
Pfizer, Inc
Purdue Pharma
QRx Pharma
Sanofi
St. Jude Medical, Inc
TEVA Pharmaceuticals Industries, Ltd
The Medicines Company
Valeant Pharmaceuticals International, Inc.
Zogenix, Inc.



Contents

CHAPTER ONE: EXECUTIVE SUMMARY

Introduction
Scope and Methodology
Size and Growth of the Market
Issues and trends
Leading Competitors

CHAPTER TWO: INTRODUCTION AND OVERVIEW

Definition of Pain

Magnitude of Pain

Physiology of Pain

Transduction

Transmission

Pain Pathways

Types of Pain

Measurement of Pain

Treatment Modalities—Pharmacologic Management

Analgesic Ladder

Step I Drugs

Step II Drugs

Step III Drugs

Recommended Drug and Route

Administration Routes

Titration

Treatment Modalities—Non-pharmacologic Management

Cognitive-Behavioral Therapies

Multidisciplinary Pain Management

Demographics

CHAPTER THREE: TREATMENT MARKETS AND FORECASTS

Burn Pain

Overview of Top Products

Opiate Agonists—Natural Alkaloids

Opiate Agonists—Semisynthetic Analogs



Opiate Agonists—Synthetic Compounds

Market Size and Growth

Markets by Region

Cancer Pain

Breakthrough Cancer Pain

Overview of Top Products

Opiate Agonists- Natural Alkaloids

Opiate Agonists-Semisynthetic Analogs

Opiate Agonists- Synthetic Compounds

Phenylpiperdine Compounds

New and/or Innovative Products

Market Size and Growth

Markets by Region

Dental/Facial Pain

Overview of Top Products

Opiate Agonists- Natural Alkaloids

Opiate Agonists-Semisynthetic Analogs

Opiate Agonists- Synthetic Compounds

Opiate Agonist-Antagonists

Centrally-acting Synthetic Analgesic Compounds

New Products

Market Size and Growth

Markets by Region

Migraine Headache Pain

Overview of Top Products

Selective Serotonin Agonists

New and/or Innovative Products

Market Size and Growth

Markets by Region

Musculoskeletal Pain

Overview of Top Products

Phenylpiperidine Compounds

Cox-2 Inhibitors

Non-steroid Anti-inflammatory Drugs

Opioid Agonists- Natural Alkaloids

Hyaluronate Sodium Derivative

New and/or Innovative Products

Market Size and Growth

Markets by Region



Neuropathic Pain

Overview of Top Products

Antiseizure Drugs

Opiate Agonists- Natural Alkaloids

Opiate Agonists-Semi-Synthetic Analogs

Phenylpiperidine Compounds

New and/or Innovative Products

Market Size and Growth

Markets by Region

Obstetrical Pain

Overview of Top Products

Opiate Agonists—Synthetic Compounds

Opiate Agonist—Antagonists

Centrally Acting Synthetic Analgesic Compounds

Phenylpiperidine Compounds

Market Size and Growth

Markets by Region

Pediatric Pain

Overview of Top Products

Opiate Agonist-Antagonists

Indole Analogs

Opiate Agonists-Semisynthetic Analogs

Opiate Agonists- Natural Alkaloids

Market Size and Growth

Markets by Region

Surgical and Trauma Pain

Overview of Top Products

Opiate Agonists—Natural Alkaloids

Opiate Agonists—Semisynthetic Analogs

Opiate Agonists—Synthetic Compounds

Opiate Agonist—Antagonists

Centrally Acting Synthetic Analgesic Compounds

New and/or Innovative Product Approvals

Market Size and Growth

Markets by Region

CHAPTER FOUR: DRUG DELIVERY

Oral Drug Delivery



Parenteral Drug Delivery
Transdermal
Patient Controlled Analgesia
Intrathecal Implants
Electrotransport Drug Delivery

CHAPTER FIVE: PAIN MANAGEMENT DEVICES

Transcutaneous Electrical Nerve Stimulators

Table of Contents v

Neuromuscular Stimulators

Spinal Cord Stimulators and Peripheral Nerve Stimulators

PCAs and Intrathecal Pain Pumps

Other Miscellaneous devices

Cranial Electrotherapy Stimulation

Electrothermal and Electromagnetic Therapy

Thermography

Market Size and Growth

Markets by Region

CHAPTER SIX: ALTERNATE TREATMENT MODALITIES

Acupuncture

ETPS Neuropathic Acupuncture

Low Level Laser Light Therapy

Biofeedback

Relaxation

Music and Pain Relief

Wave Therapy

Acupressure

Massage Therapy

Natural Supplements in Pain Management

Bioelectromagnetism

Radiofrequency Technology

Cryoablation

CHAPTER SEVEN: ISSUES AND TRENDS

Overview



Barriers to Cancer Pain Management

Education

Chronic Pain and Work

Managed Care Pain Management

The Fifth Vital Sign

Use of Psychopharmacology in Chronic Pain

Use of Botulinum Neurotoxin

Research and Development

Table of Contents vi

Dyloject

Levadex

MoxDuo IR

Naproxcinod

Pennsaid 2%

Posidur

Remoxy

Zelrix

Zohydro ER

ARC-4558

BEMA Buprenorphine

NGX 1998

Sativex

ATx08-001

The Elderly

Oxycontin Issues

Constant Pain Phenomenon

Tylenol and Liver Damage

Pain Medication Treatment Confusion

Transporter Discovery

Marijuana and Pain Control

Abuse-Deterrent Painkillers

Drug Abuse and Pain Control

CHAPTER EIGHT: MARKET SUMMARY

Total Market Size and Forecast Total Market Revenues by Region Competitor Analysis



CHAPTER NINE: CORPORATE PROFILES

Abbott Laboratories

Actavis, Inc (formerly Watson Pharmaceuticals, Inc.)

AstraZeneca plc.

Baxter International, Inc.

BioDelivery Sciences International (BDSI)

Boehringer Ingelheim

Boston Scientific

Table of Contents vii

Bristol-Myers Squibb Company

DepoMed

DURECT Corporation

Eli Lilly & Co.

Endo Health Solutions Inc

GlaxoSmithKline plc

Grunenthal Group

Medtronic, Inc.

Merck & Co.

Novartis

Pain Therapeutics, Inc

Pfizer, Inc

Purdue Pharma

QRx Pharma

Sanofi

St. Jude Medical, Inc

TEVA Pharmaceuticals Industries, Ltd

The Medicines Company

Valeant Pharmaceuticals International, Inc.

Zogenix, Inc.

APPENDIX: COMPANY DIRECTORY

LIST OF EXHIBITS

CHAPTER ONE: EXECUTIVE SUMMARY

Summary Table: Total World Pain Management Market 2010-2017 Summary Figure: Total World Pain Management Market 2010-2017

CHAPTER TWO: INTRODUCTION AND OVERVIEW



Table 2-1: Most Commonly Used Pain Quality Descriptors

Table 2-2: Pharmacokinetics of Step I Analgesics by Product

Table 2-3: Step II Analgesics: Pharmacokinetics

Table 2-4: Step III Analgesics: Pharmacokinetics

Table 2-5: Worldwide Prevalence of Selected Pain Related Conditions (est. 2012)

CHAPTER THREE: TREATMENT MARKETS AND FORECASTS

Table 3-1: World Market for Burn Pain Management 2010-2017

Table 3-2: Regional Markets for Burn Pain Management 20010-2017

Figure 3-2: Regional Markets for Burn Pain Management 2010-2017

Table 3-3: World Market for Cancer Pain Management 2010-2017

Figure 3-3: World Market for Cancer Pain Management 2010-2017

Table 3-4: Regional Markets for Musculoskeletal Pain Management 2010-2017

Figure 3-4: Regional Markets for Musculoskeletal Pain Management 2010-2017

Table 3-5: The World Market for Dental/Facial Pain Management 2010-2017

Figure 3-5: The World Market for Dental/Facial Pain Management 2010-2017

Table 3-6: Regional Markets for Dental/Facial Pain Management 2010-2017

Figure 3-6: Regional Markets for Dental/Facial Pain Management 2010-2017

Table 3-7: World Market for Migraine Pain Management 2010-2017

Figure 3-7: World Market for Migraine Pain Management 2010-2017

Table 3-8: Regional Markets for Migraine Pain Management 2010-2017

Figure 3-8: Regional Markets for Migraine Pain Management 2010-2017

Table 3-9: World Market for Musculoskeletal Pain Management 2010-2017

Figure 3-9: World Market for Musculoskeletal Pain Management 2010-2017

Table 3-10: Regional Markets for Musculoskeletal Pain Management 2010-2017

Figure 3-10: Regional Markets for Musculoskeletal Pain Management 2010-2017

Table 3-11: World Market for Neuropathic Pain Management 2010-2017

Figure 3-11: World Market for Neuropathic Pain Management 2010-2017

Table 3-12: Regional Markets for Neuropathic Pain Management 2010-2017

Figure 3-12: Regional Markets for Neuropathic Pain Management 2010-2017

Table 3-13: World Market for Obstetrical Pain Management 2010-2017

Figure 3-13: World Market for Obstetrical Pain Management 2010-2017

Table 3-14: Regional Markets for Obstetrical Pain Management 2010-2017

Figure 3-14: Regional Markets for Obstetrical Pain Management 2010-2017

Table 3-15: The World Market for Pediatric Pain Management 2010-2017

Table 3-16: Regional Markets for Pediatric Pain Management 2010-2017

Figure 3-16: Regional Markets for Pediatric Pain Management 2010-2017



Table 3-17: World Market for Surgical and Trauma Pain Management 2010-2017

Table 3-18: Regional Markets for Surgical and Trauma Pain Management 2010-2017

Figure 3-18: Regional Markets for Surgical and Trauma Pain Management 2010-2017

CHAPTER FIVE: PAIN MANAGEMENT DEVICES

Table 5-1: World Market for Pain Management Devices 2010-2017

Figure 5-1: World Market for Pain Management Devices 2010-2017

Table 5-2: Regional Markets for Pain Management Devices 2010-2017

Figure 5-2: Regional Markets for Pain Management Devices 2010-2017

CHAPTER SIX: ALTERNATE TREATMENT MODALITIES

Table 6-1: Pain Management Supplements in Clinical Trials

CHAPTER SEVEN: ISSUES AND TRENDS

Table 7-1: Pain Management Products in Development 2012

CHAPTER EIGHT: MARKET SUMMARY

Table 8-1: Total World Pain Management Market 2010-2017

Figure 8-1: Total World Pain Management Market 2010-2017

Table 8-2: World Pain Management Market by Product Segment (Pain Type),

2010-2017

Table 8-3: Total Regional Markets for Pain Management 2010-2017

Figure 8-4: Total Regional Markets for Pain Management 2010-2017

Table 8-4: World Market for Top Pain Management Treatments Revenues and

Segments of Participation by Major Areas of Participation 2012

Table 8-5: Revenues and Market Share by Company 2012 (some are estimated)

Figure 8-6: Market Share Percent by Company 2012

CHAPTER NINE: CORPORATE PROFILES

Figure 9-1: Abbott's Financial Performance, 2010-2012

Figure 9-2: Actavis' Financial Performance, 2010-2012

Figure 9-3: AstraZeneca's Financial Performance, 2010-2012

Figure 9-4: Baxter International's Financial Performance, 2010-2012

Figure 9-6: Bristol-Myers Squibb's Financial Performance, 2010-2012



- Figure 9-7: Eli Lilly's Financial Performance, 2010-2012
- Figure 9-8: Endo Health Solutions' Financial Performance, 2010-2012
- Figure 9-9: GlaxoSmithKline's Financial Performance, 2010-2012
- Figure 9-10: Grunenthal's Financial Performance, 2010-2012
- Figure 9-11: Johnson and Johnson's Financial Performance, 2010-2012
- Figure 9-12: Medtronic's Financial Performance, 2010-2012
- Figure 9-13: Merck's Financial Performance, 2010-2012
- Figure 9-14: Novartis' Financial Performance, 2010-2012
- Figure 9-15: Pfizer's Financial Performance, 2010-2012
- Figure 9-16: Sanofi's Financial Performance, 2010-2012
- Figure 9-17: St Jude's Financial Performance, 2010-2012
- Figure 9-16: Teva's Financial Performance, 2010-2012



About

Once the nociceptive signal arrives in the CNS, it is processed within thedorsal horn of the spinal cord. This processing includes releasing neurotransmittersfrom the PAN into the synaptic cleft and binding neurotransmitters to receptors onnearby cell bodies and dendrites of cells that may be located elsewhere in the dorsalhorn. Some of these PAN neurotransmitters produce activation when bound toreceptors whereas other inhibits activation of nearby cells. Cells excited by PANinput release other neurotransmitters, which increases the complexity of theneurochemical communication occurring within the dorsal horn. The effects of thecomplex neurotransmitter release can facilitate or inhibit transmission of nociceptivestimuli.

Most projection cells send axons to the brain on the opposite side of the body. They receive excitatory and inhibitory messages, the net sum of which determines whether the PSN message will be transmitted to the brain.

Interneurons can be either excitatory or inhibitory. They communicate withother lamina II cells, located within one or two spinal segments, and with dendritesfrom cells located in laminae I, III, IV, and V. The concept of excitatory andinhibitory interneurons is important because it helps to explain why some nonpharmacologictherapies are effective. Although the exact mechanisms have not beendetermined, it is known that simulation of large sensory fibers can have an inhibitoryeffect on cells that project nociceptive signals to the brain. TENS and massage are examples of methods by which smaller, less rapidly conducting fibers can beactivated by non-noxious stimuli. All of these methods are known to inhibit transmission of nociceptive stimuli.



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