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AI Chronic Pain Management Market Forecasts to 2032 – Global Analysis By Component (Software, Hardware, and Services), Deployment Mode, Distribution Channel, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global AI Chronic Pain Management Market is accounted for $6.07 billion in 2025 and is expected to reach $20.78 billion by 2032 growing at a CAGR of 19.2% during the forecast period. AI Chronic Pain Management refers to the application of artificial intelligence technologies to assess, monitor, and treat long-term pain conditions. It integrates machine learning, predictive analytics, and digital tools to personalize pain management strategies, improve diagnosis accuracy, and optimize treatment outcomes. By analyzing patient data, wearable device inputs, and medical histories, AI enables early intervention, reduces dependency on opioids, and enhances overall quality of life for individuals suffering from chronic pain.

Market Dynamics:

Driver:

Growing prevalence of chronic pain

The increasing global burden of chronic pain is driving demand for innovative management solutions. Conditions such as arthritis, fibromyalgia, and neuropathic pain are becoming more prevalent due to aging populations and lifestyle factors. Traditional pain management methods often fall short in providing long-term relief, prompting interest in AI-driven approaches. AI technologies offer the potential to analyse patient data and optimize treatment plans with greater precision. As healthcare systems seek

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more effective and scalable solutions, AI is emerging as a key enabler of personalized pain care. This growing need is catalysing investments and adoption across hospitals, clinics, and digital health platforms.

Restraint:

Resistance from healthcare professionals

Concerns around data reliability, clinical validation, and loss of human oversight hinder adoption. Physicians may be reluctant to trust algorithmic recommendations over their clinical judgment, especially in complex pain cases. Limited training and exposure to AI tools further exacerbate resistance within the medical community. Additionally, regulatory ambiguity and ethical considerations contribute to hesitation in deploying AI-based interventions. This resistance slows market penetration and limits the full potential of AI in transforming pain care.

Opportunity:

Personalized and predictive treatment

Predictive algorithms can forecast pain flare-ups and recommend pre-emptive interventions, improving patient outcomes. These capabilities support proactive care models, reducing reliance on reactive and often ineffective treatments. Integration with wearable devices and mobile apps enhances real-time monitoring and feedback loops. As precision medicine gains traction, AI-driven pain management aligns with broader healthcare trends toward individualized care. This opportunity is attracting start-ups, tech giants, and healthcare providers seeking to differentiate their offerings.

Threat:

Risk of inaccurate predictions and patient harm

AI systems in pain management are vulnerable to inaccuracies stemming from biased or incomplete datasets. Misdiagnosis or inappropriate treatment recommendations can lead to patient harm, undermining trust in the technology. Overreliance on algorithms without adequate clinical oversight may exacerbate risks, especially in complex or atypical cases. Errors in prediction models can result in delayed care, worsening patient conditions. Regulatory scrutiny is intensifying to ensure safety and accountability in AI applications. These risks pose a significant threat to market credibility and long-term

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adoption.

Covid-19 Impact

The COVID-19 pandemic accelerated the adoption of digital health tools, including AI-based pain management platforms. Lockdowns and limited access to in-person care drove demand for remote monitoring and virtual consultations. AI tools helped bridge gaps in chronic pain care by enabling symptom tracking and treatment adjustments from home. However, supply chain disruptions and funding reallocations temporarily slowed development and deployment of new AI solutions. This shift continues to support growth in AI-driven chronic pain management solutions.

The softwaresegment is expected to be the largest during the forecast period

The softwaresegment is expected to account for the largest market share during the forecast period, fuelled by increasing adoption of personalized treatment tools, advanced machine learning for pain prediction, and cloud-enabled remote care solutions. Notable trends include app-based pain monitoring, integration with wearable devices, and subscription-based AI platforms. Recent advancements feature collaborations between tech companies and healthcare providers to create interoperable systems that align with electronic health records, streamline clinical decision-making, and support patient-centric, outcome-driven care models.

The homecaresegment is expected to have the highest CAGR during the forecast period

Over the forecast period, the homecaresegment is predicted to witness the highest growth rate, driven by growing interest in remote, individualized care supported by technologies like IoT-enabled devices, wearable sensors, and AI-based monitoring systems. Key trends include virtual pain management, real-time data-driven adaptive care, and predictive tools for early symptom detection. Recent innovations involve strategic alliances between technology providers and healthcare organizations to deliver scalable, cloud-supported platforms that empower patients, lower hospital dependency, and align with evolving reimbursement and value-based care models.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market sharedue to increasing cases of chronic pain, expanding digital healthcare systems, and

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a shift toward non-opioid treatment options. Technologies such as AI-integrated mobile platforms, wearable health trackers, and cloud-based analytics are gaining traction. Key trends include virtual pain support, multilingual AI tools, and telemedicine integration. Recent progress includes regional tech-healthcare partnerships, government-led digital health programs, and rising investments in scalable AI solutions tailored to diverse patient needs.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to widespread chronic pain cases, robust healthcare systems, and strong uptake of digital treatment solutions. Technologies such as AI-driven diagnostic tools, wearable pain monitoring devices, and cloud-integrated platforms linked to electronic health records are key enablers. Emerging trends include personalized pain management algorithms, neuromodulation insights, and virtual coaching. Recent milestones include a surge in hospital adoption of AI tools, increased funding for biologics research, and expanded telehealth-based pain care services.

Key players in the market

Some of the key players profiled in the AI Chronic Pain Management Market includeJohnson & Johnson, Horizon Therapeutics, Pfizer, Amgen, Medtronic, Mallinckrodt, Teva Pharmaceuticals, AstraZeneca, AbbVie, Bristol-Myers Squibb, Eli Lilly, Regeneron Pharmaceuticals, BoehringerIngelheim, Novartis, and GlaxoSmithKline (GSK).

Key Developments:

In July2025, Johnson & Johnson announced the launch of the VIRTUGUIDE™ System. This AI-powered, patient-matched solution is designed to support Lapidus procedures2, a type of bunion surgery that helps realign the foot by joining two bones near the arch (the first metatarsal bone and the medial cuneiform).3 The system uses pre-operative planning software, developed in collaboration with PeekMed®, to assess each patient's bunion and make personalized recommendations for the intended correction.

In October2023,Amgen announced that it has completed its acquisition of Horizon Therapeutics plc for $116.50 per share in cash, representing a transaction equity value of approximately $27.8 billion.

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Components Covered:

- Software
- Hardware
- Services

Deployment Modes Covered:

- Cloud-Based
- On-Premises

Distribution Channels Covered:

- Online Platforms
- Offline

Applications Covered:

- Neuropathic Pain
- Musculoskeletal Pain
- Cancer-related Pain
- Migraine and Facial Pain
- Fibromyalgia
- Other Applications

End Users Covered:

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- Hospitals and Clinics
- Homecare
- Ambulatory Surgical Centers
- Research Institutions
- Academic Centers
- Nursing Homes
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe

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  - India
  - Australia
  - New Zealand
  - South Korea
  - Rest of Asia Pacific
- South America
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  - Brazil
  - Chile
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- Middle East & Africa
  - Saudi Arabia
  - UAE
  - Qatar
  - South Africa
  - Rest of Middle East & Africa

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What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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