

Neuropathic Pain Market Forecasts to 2030 – Global Analysis By Drug Class (Antidepressants, Anticonvulsant, Opioids, Capsaicin, Steroids and Other Drug Classes), Indication, Patient Type, Route of Administration, Distribution Channel and By Geography

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Abstracts

According to Statistics MRC, the Global Neuropathic Pain Market is accounted for \$8.24 billion in 2024 and is expected to reach \$14.35 billion by 2030 growing at a CAGR of 9.7% during the forecast period. Neuropathic pain is a complex, chronic pain condition that arises due to damage or dysfunction in the nervous system. Diabetes, shingles, multiple sclerosis, and nerve injuries are among the conditions that frequently cause it. This kind of pain can be accompanied by hypersensitivity to touch or temperature changes and is typified by feelings of burning, stabbing, tingling, or numbness. It can be difficult to treat, necessitating a multimodal strategy that may involve drugs, physical therapy, nerve blocks, and counselling. Moreover, a person's quality of life is greatly impacted by the condition, so improving patient outcomes requires early diagnosis and efficient treatment.

According to a narrative review published in the National Institutes of Health's PubMed Central, neuropathic pain does indeed affect approximately 7-10% of the general population.

Market Dynamics:

Driver:

Growing number of neuropathic disorders

Neuropathic pain is often associated with underlying conditions such as diabetes, post-herpetic neuralgia, multiple sclerosis, and traumatic nerve injuries. For instance, studies indicate that about 50% of individuals with diabetes will eventually develop diabetic neuropathy, making the global increase in diabetes a major contributing factor. Furthermore, nerve degeneration is more likely to occur in an aging population, which increases the prevalence of age-related disorders like neuropathy. The need for efficient pain management treatments is fueled by the increasing prevalence of these illnesses. The market for therapies and diagnostic equipment is anticipated to expand in tandem with the rise in the number of people experiencing neuropathic pain.

Restraint:

Absence of effective treatment choices

Even with improvements in neuropathic pain management, there is still a big need for long-term, really effective therapies. Many of the treatments available today only offer partial relief, and some have unfavorable side effects like fatigue, lightheadedness, or digestive problems. For instance, opioid drugs are useful for treating acute pain, but their use in treating chronic pain is restricted due to their high potential for addiction and dependency. Additionally, some patients might not respond to commonly prescribed medications, which can cause frustration and delay in locating an appropriate course of treatment.

Opportunity:

Evolution of personalized medicine

The trend toward personalized medicine is one of the most exciting prospects in the market for neuropathic pain. The genetic, molecular, and environmental factors that contribute to neuropathic pain are becoming better understood as research progresses. More effective and targeted pain relief with fewer side effects may be possible with personalized treatments based on a patient's genetic profile, pain pathways, and reaction to medication. Moreover, businesses are already looking into genetic markers to forecast a patient's reaction to particular neuropathic painkillers. This strategy could significantly increase treatment success rates, cut down on trial and error, and provide patients with more individualized pain management options, making it a very profitable area for innovation.

Threat:

Vigorous competition from generic medicines

The market for neuropathic pain is seriously threatened by the availability of generic medications. There are now generic versions of many drugs used to treat neuropathic pain, including duloxetine, pregabalin, and gabapentin. Since generic medications are usually far less expensive than their branded equivalents, businesses that have created unique formulations have a much smaller chance of making money. Pharmaceutical companies are under pressure to cut prices due to the fierce competition from generics, which can reduce profit margins. Additionally, this price competition will also get more intense as generic versions of neuropathic painkillers continue to hit the market as more patents for these drugs expire.

Covid-19 Impact:

The market for neuropathic pain was significantly impacted by the COVID-19 pandemic, both positively and negatively. As hospitals and clinics concentrated their resources on treating COVID-19 cases, the global healthcare crisis caused disruptions in healthcare systems, including delays in the diagnosis and treatment of neuropathic pain. Patients had less access to specialized pain management therapies as a result of routine appointments and elective procedures being delayed. Financial limitations brought on by the pandemic's economic downturn also made it harder for patients to pay for treatments, particularly those that required sophisticated therapies or procedures.

The Diabetic Neuropathy segment is expected to be the largest during the forecast period

The Diabetic Neuropathy segment is expected to account for the largest market share during the forecast period. This dominance is explained by the high global prevalence of diabetes, which causes diabetic neuropathy in a considerable number of people. The International Diabetes Federation (IDF), for example, projected that by 2022, 643 million adults between the ages of 20 and 79 would have diabetes by 2030, and by 2045, that number would have increased to 783 million. Moreover, the market share of this segment is strengthened by the large number of diabetics, which raises the need for efficient treatments for diabetic neuropathy.

The Adult segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Adult segment is predicted to witness the highest growth rate. The main cause of this growth is the rising incidence of diseases like postherpetic neuralgia and diabetic neuropathy in adults. The International Diabetes Federation (IDF), for example, projected that by 2022, 643 million adults between the ages of 20 and 79 would have diabetes by 2030, and by 2045, that number would have increased to 783 million. Additionally, the market share of this segment is strengthened by the large number of diabetics, which raises the need for efficient treatments for diabetic neuropathy.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share. The main cause of this dominance is the high frequency of neuropathic conditions that are more common in adults, such as diabetic neuropathy, post herpetic neuralgia, and chemotherapy-induced peripheral neuropathy. The development of the market in this area is also greatly influenced by the existence of sophisticated healthcare infrastructure, as well as by greater awareness of and access to treatment options. Furthermore, North America leads the market due to the growing number of people with chronic illnesses like diabetes and the continuous research and development of new pain management treatments.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR. The increasing prevalence of diabetic neuropathy and other neuropathic conditions, as well as the region's growing healthcare infrastructure and improved access to healthcare, are the main causes of this rapid growth. The need for efficient pain management treatments is also being fueled by rising awareness of neuropathic pain and its available treatments, as well as bettering economic conditions and healthcare spending in nations like China and India. Moreover, the strong growth prediction for the APAC region in the upcoming years is influenced by these factors.

Key players in the market

Some of the key players in Neuropathic Pain market include Abbott Laboratories, Pfizer, Inc, Sanofi S.A., Johnson & Johnson Services, Inc., Novartis AG, Eli Lilly and Company, GlaxoSmithKline PLC, Teva Pharmaceutical Industries Ltd., Baxter Healthcare Corporation, Collegium Pharmaceutical, Inc., Mallinckrodt Pharmaceuticals, Sun

Pharmaceutical Industries Ltd, Glenmark Pharmaceuticals Limited, Bristol-Myers Squibb Company and Grunenthal GmbH.

Key Developments:

In December 2024, Teva Pharmaceutical Industries Ltd. announced that it has entered into an agreement with JKI, established by the fund managed and operated by J-Will, whereby all shares of Teva Takeda Pharma Limited and its wholly owned subsidiary Teva Takeda Yakuhin Ltd. will be transferred to JKI.

In September 2024, Abbott India Limited has signed a non-exclusive patent license agreement with Takeda Pharmaceuticals Company Limited to market and distribute 'Vonoprazan' in India under the brand name 'Vonefi'. Vonoprazan addresses severe acid related disorders like reflux esophagitis through a once daily dose.

In August 2024, Johnson & Johnson¹ announced that it has entered into a definitive agreement to acquire V-Wave Ltd., a privately-held company focused on developing innovative treatment options for patients with heart failure. Under the terms of the agreement, Johnson & Johnson will acquire V-Wave for an upfront payment of \$600 million, subject to customary adjustments, with the potential for additional regulatory and commercial milestone payments up to approximately \$1.1 billion.

Drug Classes Covered:

Antidepressants

Anticonvulsant

Opioids

Capsaicin

Steroids

Other Drug Classes

Indications Covered:

Diabetic Neuropathy

Spinal Stenosis

Post-Herpetic Neuralgia

Chemotherapy-Induced Peripheral Neuropathy

Other Indications

Patient Types Covered:

Adult

Geriatric

Pediatric

Route of Administrations Covered:

Oral

Transdermal

Intravenous

Topical

Distribution Channels Covered:

Hospital Pharmacy

Retail Pharmacy

Online Pharmacy

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

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 2022, 2023, 2024, 2026, and 2030
- 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

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

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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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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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