

Joint Pain Injections Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type of Injection (Steroid Joint Injections, Hyaluronic Acid Injections, Platelet-rich Plasma (PRP) Injections, Placental Tissue Matrix (PTM) Injections, Others), By Application (Shoulder & Elbow, Knee & Ankle, Spinal Joints, Hip Joint, Others), By Region, and By Competition

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Abstracts

Global Joint Pain Injections Market has valued at USD 1.10 billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 5.11% through 2028. The global joint pain injections market is a dynamic segment of the healthcare industry that addresses the growing prevalence of joint-related conditions, particularly osteoarthritis and rheumatoid arthritis. Joint pain injections offer a non-surgical and minimally invasive treatment option for individuals suffering from chronic joint pain and inflammation. These injections typically consist of corticosteroids, hyaluronic acid, platelet-rich plasma (PRP), or other medications designed to alleviate pain, reduce inflammation, and improve joint function.

Key Market Drivers

Rising Obesity Rates

Obesity, a worldwide health concern, has become an epidemic that extends beyond the issue of body image to one of profound health implications. It's not just about fitting into smaller clothes but also about managing the serious health problems that often

accompany obesity. Among these issues, joint pain is a prominent concern, and it's a primary driver of the growing global market for joint pain injections.

Obesity is a complex and multifaceted health issue. It's characterized by an excessive accumulation of body fat and is commonly measured using the body mass index (BMI). A BMI of 30 or higher is considered obese, and the condition affects people of all ages, races, and socioeconomic backgrounds.

The global prevalence of obesity has surged over the past few decades, making it a pressing public health issue. The World Health Organization (WHO) reports that worldwide obesity has nearly tripled since 1975. In 2016, more than 1.9 billion adults were overweight, and over 650 million were obese. This trend is alarming not only because of its implications for conditions like heart disease and diabetes but also because of its significant impact on musculoskeletal health, leading to joint pain and mobility issues.

The additional weight places increased pressure on the joints, particularly the knees, hips, and lower back. This added load can accelerate the degeneration of joint tissues. Fat tissue, especially visceral fat, produces inflammatory substances that can contribute to joint inflammation. Inflammation is a key driver of joint pain. Obesity is a significant risk factor for osteoarthritis, a common joint condition. In this disease, the protective cartilage covering the ends of bones breaks down, leading to pain, swelling, and reduced mobility. Obesity often leads to reduced physical activity, which can weaken the muscles supporting the joints. This further compounds joint pain and increases the risk of injury.

With more individuals suffering from obesity-related joint pain, there is a larger patient pool seeking effective solutions. Joint pain injections offer a minimally invasive and efficient way to manage pain and improve mobility, making them an appealing choice for patients. Obesity can complicate surgical procedures, and patients with obesity may face a higher risk of complications during joint replacement surgeries. Joint pain injections provide an alternative to invasive surgical interventions, reducing both risks and costs. Obesity-related joint pain is often chronic, requiring long-term management. Joint pain injections can provide long-lasting relief, allowing patients to maintain a more active lifestyle, despite their weight, and thus fostering patient loyalty to the treatment. As the obesity epidemic garners more attention in the public health sphere, individuals are becoming increasingly aware of the link between obesity and joint pain. This heightened awareness can drive patients to explore joint pain injection options.

Minimally Invasive Approach

Joint pain is a pervasive issue, affecting millions of people around the world and impeding their quality of life. Conditions like osteoarthritis and rheumatoid arthritis can cause chronic discomfort and reduced mobility. In response to this, the global joint pain injections market has emerged as a promising solution, and one of its key drivers of growth is the minimally invasive approach it offers.

A minimally invasive approach in medical procedures involves using techniques that require smaller incisions or no incisions at all, as opposed to traditional open surgeries. These methods aim to minimize trauma to the body, reduce pain, lower the risk of complications, and expedite recovery. When it comes to addressing joint pain, this approach has revolutionized the way patients manage their pain and has greatly contributed to the growth of the joint pain injections market.

Minimally invasive joint pain injections, compared to open surgical procedures, offer a significantly lower risk of complications such as infection, excessive bleeding, or adverse reactions to anesthesia. Patients and healthcare providers both appreciate the decreased likelihood of complications, making injections a safer and more appealing option. Recovery times for minimally invasive procedures are generally shorter. Patients can often return to their normal activities more rapidly than after open surgeries. This shorter recovery period is particularly beneficial for individuals with busy lives or those who want to regain their mobility quickly. Many joint pain injections are performed in outpatient settings, allowing patients to receive treatment without the need for hospitalization. This convenience is a strong driver of patient preference, as it reduces the time and cost associated with inpatient care. Minimally invasive injections typically involve smaller incisions or needle insertions, leading to less tissue damage and, consequently, less pain and discomfort post-procedure. This is a significant selling point for patients seeking relief from joint pain. Since minimally invasive procedures often require less time in the operating room and a shorter hospital stay (or none at all), they are usually more cost-effective than traditional surgeries. This cost-efficiency benefits both patients and healthcare systems. Minimally invasive joint pain injections allow for precise targeting of the affected area. Whether it's a corticosteroid injection, hyaluronic acid injection, or platelet-rich plasma (PRP) injection, these treatments can be precisely administered, increasing their effectiveness. Patients increasingly prefer to have a say in their healthcare decisions. Minimally invasive approaches, including joint pain injections, align with this patient-centric trend. Patients appreciate having choices and being involved in deciding their treatment course. The appeal of minimally invasive treatments extends to a broad demographic, including both the elderly and younger,

more active individuals. Younger patients, in particular, appreciate the convenience and quick recovery associated with minimally invasive joint pain injections.

Increased Awareness and Education

Joint pain is a common ailment that affects millions of people worldwide, often due to conditions like osteoarthritis and rheumatoid arthritis. The impact of joint pain on individuals' quality of life can be significant, making effective treatment options a vital necessity. One key driver of the growing global joint pain injections market is increased awareness and education.

In recent years, there has been a notable surge in health awareness campaigns and educational initiatives. These programs are aimed at informing the public about various health conditions, their symptoms, and available treatment options. Joint pain is no exception to this trend, and patients now have access to a wealth of information about the causes, consequences, and treatment choices for their discomfort.

The availability of information empowers patients to take an active role in their healthcare. Informed patients are more likely to discuss their symptoms and potential treatment options with healthcare providers, leading to a more collaborative approach to care. This collaborative model can result in a higher likelihood of joint pain injections being considered and chosen as a treatment method. In the past, there has been a stigma surrounding joint pain conditions, with sufferers often reluctant to seek treatment or share their experiences. Increased awareness campaigns have helped to destigmatize these conditions, making it more socially acceptable to seek treatment. Consequently, patients are more likely to explore and accept joint pain injections as a viable solution. Many awareness initiatives stress the importance of early intervention and preventative care. This focus on prevention and early management has led to the recognition of joint pain injections as a proactive approach to preserving joint health. As a result, more individuals are considering these injections as a means of avoiding chronic pain. Comprehensive health education often emphasizes the importance of a holistic approach to well-being. This means addressing not just the symptoms but also the underlying causes of health conditions. Joint pain injections, which can target both symptoms and causes, align with this holistic approach, making them a valuable component of comprehensive care. In addition to formal education campaigns, online forums, social media communities, and patient support groups have played a significant role in disseminating information about joint pain and its treatments. These platforms facilitate shared experiences, advice, and information exchange, further promoting the use of joint pain injections. Better education about joint pain symptoms has led to early

diagnosis and intervention. Patients are now more likely to recognize joint pain conditions before they progress to advanced stages, making joint pain injections a viable early treatment option.

Patient-Centric Care

The landscape of healthcare is evolving, and the concept of patient-centric care is at the forefront of this transformation. As patients become more actively involved in their healthcare decisions, this approach has given rise to new trends and treatments. In the world of pain management, joint pain injections have gained significant traction, thanks in part to the principles of patient-centric care.

Patient-centric care is a healthcare model that prioritizes the individual patient's needs, preferences, and values. It involves actively involving the patient in medical decision-making and tailoring care to their unique circumstances. This approach has profound implications for the management of chronic conditions like joint pain.

In the patient-centric care model, patients play an active role in their healthcare decisions. When it comes to managing joint pain, this means patients have a say in the choice of treatment, including the decision to explore joint pain injections. Healthcare providers work collaboratively with patients to discuss the various options and select the one that best aligns with the patient's goals and preferences. Patients have diverse experiences with joint pain, and what works for one person may not work for another. Patient-centric care recognizes this individuality and tailors treatment plans to the patient's specific needs. Joint pain injections, with their various options, offer a versatile choice that can be customized to each patient's condition. When patients feel heard and respected in their care, their satisfaction with the healthcare experience increases. Joint pain injections are known for their effectiveness and minimally invasive nature, making them an appealing option for patients who desire efficient and patient-centric pain management. Patients who actively participate in their care decisions and understand their treatment options are more likely to adhere to their treatment plans. This can lead to better outcomes for conditions like joint pain. Joint pain injections, which are relatively straightforward and low-risk, are often more attractive to patients, increasing the likelihood of treatment adherence. The patient-centric care model aims to reduce the physical and emotional burden on patients. Joint pain injections, as minimally invasive procedures, are often less disruptive to daily life compared to surgical interventions, aligning well with the model's goal of minimizing patient inconvenience. Patient-centric care places a strong emphasis on improving the patient's quality of life. Joint pain injections, by reducing pain, increasing mobility, and enhancing overall well-being, are

aligned with this central goal.

Key Market Challenges

Reimbursement Issues

Reimbursement policies and insurance coverage can significantly affect the adoption of joint pain injections. Patients may be less inclined to choose these treatments if they are not adequately covered by their insurance, as the out-of-pocket costs can be substantial. Ensuring broader insurance coverage and reimbursement support is crucial for the market's expansion.

Competition and Pricing Pressures

The global joint pain injections market is competitive, with numerous pharmaceutical and medical device companies offering their products. This competition can lead to pricing pressures, potentially resulting in reduced profit margins and the need for cost-effective production and marketing strategies to maintain profitability.

Variability in Patient Response

Not all patients respond to joint pain injections in the same way. Some may experience significant pain relief and improved mobility, while others may not derive the same benefits. This variability in patient response can be a challenge, as it underscores the need for personalized treatment plans and a better understanding of which patients are most likely to benefit from these injections.

Key Market Trends

Advancements in Biologics and Regenerative Therapies

Biologics, such as platelet-rich plasma (PRP) injections, are gaining prominence in the treatment of joint pain. These therapies use a patient's own cells and growth factors to stimulate tissue repair and regeneration. The development of more sophisticated biologics and regenerative therapies is expected to provide longer lasting and more significant pain relief for joint pain sufferers.

AI and Data Analytics for Treatment Optimization

Artificial intelligence (AI) and data analytics are increasingly being used to optimize joint pain injection treatments. These technologies can assist healthcare providers in identifying the most suitable treatment for a patient based on their medical history, lifestyle, and the latest research. AI-driven treatment recommendations may improve the precision and effectiveness of joint pain injections.

Expanding Geographical Reach

While North America and Europe have traditionally dominated the joint pain injections market, there is a growing interest and investment in emerging markets, particularly in the Asia-Pacific region. As healthcare infrastructure and patient awareness improve, the market's geographical reach is set to expand, creating new growth opportunities.

Segmental Insights

Type of Injection Insights

Based on the category of Type of Injection, the Hyaluronic Acid Injections sector is poised for growth in the foreseeable future. These injections are employed to alleviate knee pain associated with osteoarthritis (OA) in patients who have already attempted ineffective treatments like acetaminophen and other pain relievers. Hyaluronic acid injections have gained popularity as a non-surgical therapeutic option, particularly due to clinicians' hesitancy to administer repeated corticosteroid injections into the joints.

Market participants are actively engaged in the development of innovative products with numerous advantages, frequently introducing new offerings. For example, in August 2021, Seikagaku Corporation introduced HyLink, a single-injection Visco supplement for intra-articular use in treating knee osteoarthritis in Taiwan through TCM Biotech International Corp. The primary ingredient is a cross-linked hyaluronate hydrogel created using cross-linking technology. These product launches are expected to drive growth in this segment during the forecast period.

Application Insights

Based on Application, the Knee & Ankle segment is poised to capture a significant market share in the Global Joint Pain Injections Market during the forecast period for several compelling reasons. Firstly, knee and ankle joints are particularly susceptible to wear and tear, making them more prone to conditions like osteoarthritis and sports-related injuries, driving the demand for pain-relieving injections. Secondly, the rise in the

aging population, combined with the growing prevalence of joint-related issues, has increased the patient pool seeking effective non-surgical solutions. Additionally, advancements in injection technologies and the development of specialized products tailored to the specific needs of the knee and ankle joints have made these injections more efficient and accessible. Furthermore, patients and healthcare providers increasingly prefer these injections over surgical interventions, making the Knee & Ankle segment a promising growth area within the Joint Pain Injections Market.

Regional Insights

In the forthcoming period, North America is poised to maintain its dominant position in the Joint Pain Injections Market. This can be attributed to several key factors. Firstly, the region faces a high prevalence of musculoskeletal disorders, driven in part by a growing aging population. Secondly, the strong presence of industry leaders in North America, coupled with superior healthcare infrastructure, has facilitated the growth of this market. Furthermore, there is a heightened level of awareness among both the public and healthcare professionals regarding available technologies. Additionally, North America boasts a concentration of major market players who are actively investing in research activities, further bolstering market growth.

According to the Centers for Disease Control and Prevention (CDC), millions of individuals in the United States grapple with chronic pain stemming from arthritis annually. The adoption of advanced technologies is a noteworthy catalyst for market expansion in this region. Moreover, demographic trends support this trend, as the Population Reference Bureau estimates that by 2060, there will be approximately 95 million Americans aged 65 and older, constituting 23% of the total population. In Canada, the 2021 census conducted by Statistics Canada revealed an estimated 7,021,430 individuals aged 65 and above, of which 3,224,680 were male and 3,796,750 were female. This surge in the geriatric population is anticipated to drive demand for joint pain injections and, consequently, foster market growth in the region.

Key Market Players

Anika Therapeutics Inc

Bioventus LLC

Ferring Pharmaceuticals Inc

Sanofi SA

Pfizer Inc

Eli Lilly & Co

Flexion Therapeutics Inc

Teva Pharmaceutical Industries Ltd

Zimmer Biomet Holdings, Inc.

Report Scope:

In this report, the Global Joint Pain Injections Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Joint Pain Injections Market, By Type of Injection:

Steroid Joint Injections

Hyaluronic Acid Injections

Platelet-rich Plasma (PRP) Injections

Placental Tissue Matrix (PTM) Injections

Others

Joint Pain Injections Market, By Application:

Shoulder & Elbow

Knee & Ankle

Spinal Joints

Hip Joint

Others

Joint Pain Injections Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Joint Pain Injections Market.

Available Customizations:

Global Joint Pain Injections market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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