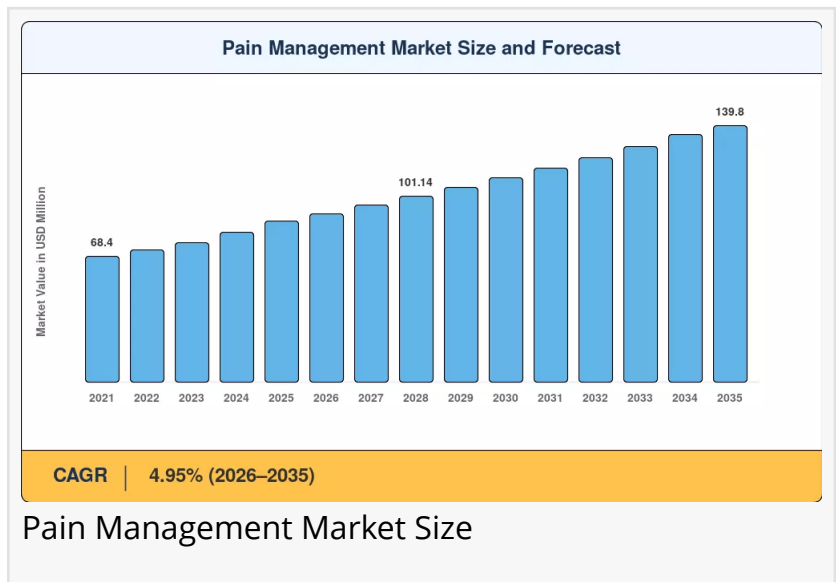


Pain Management Market to reach USD 139.80 Billion by 2035 at 4.95% CAGR

Pain Management Market to Surge from USD 91.82 Billion in 2026 to USD 139.80 Billion by 2035- Powered by Aging Population and Chronic Disease Burden

NY, CA, UNITED STATES, June 11, 2026 /EINPresswire.com/ -- As per Market Research Future, the [global Pain Management Market size](#) to reach USD 139.80 Billion by 2035 from USD 91.82 Billion in 2026, at a CAGR of 4.95% during the forecast period 2026--2035. The market base was estimated at USD 87.65 Billion in 2025.



The 4.95% CAGR---reflecting a structural transformation from opioid-centric to multimodal care paradigms---is driven by three converging forces: the global aging population projected to reach 2.1 billion persons over 60 by 2050, creating an inexorable demand for chronic pain therapy solutions; regulatory shifts such as the U.S. CDC's 2022 Clinical Practice Guideline and the European Commission's Pharmaceutical Strategy earmarking EUR 1.2 billion for non-addictive analgesic R&D through 2030, which are pushing clinicians toward multimodal analgesia approaches; and the emergence of next-generation neuromodulation platforms---closed-loop spinal cord stimulators, AI-adaptive algorithms, and prescription digital therapeutics---capable of delivering durable pain relief without pharmacological dependency.

National governments and health systems are amplifying this momentum. The U.S. Substance Abuse and Mental Health Services Administration (SAMHSA) allocated USD 7.4 billion in FY2024 to opioid-response programs, indirectly accelerating demand for non-pharmacological pain relief alternatives. The European Commission's EU Action Plan on Pain Management, published in November 2023, allocated EUR 800 million for non-pharmacological pain relief research across member states through 2028.

India's Ayushman Bharat scheme now covers 500 million beneficiaries, and China's National Healthcare Security Administration expanded chronic pain therapy reimbursement categories in

2024. Together, these initiatives are creating the reimbursement infrastructure and clinical guidelines on which multimodal analgesia approaches depend.

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Key Market Trends & Growth Drivers

Aging Population and Chronic Disease Burden

By 2050, there will be 2.1 billion persons over 60, about twice as many as there were in 2020, according to WHO projections. Age-related illnesses such as osteoarthritis, diabetic neuropathy, and post-surgical pain are the main causes of the ongoing need for chronic pain management.

According to the National Institutes of Health, approximately 51 million adults in the US suffer from chronic pain, which costs the country's economy between USD 560 and USD 635 billion a year in direct medical costs and lost productivity. This demographic pressure guarantees the Pain Management Market's baseline expansion regardless of technological cycles.

Neuropathic pain leads the Pain Management Market by application, reflecting the global diabetes epidemic that affects over 537 million adults. Multimodal analgesia approaches combining gabapentinoids, topical agents, and neuromodulation are replacing opioid analgesic treatment monotherapy for conditions like painful diabetic peripheral neuropathy. Early-adopter health systems report that integrated chronic pain therapy protocols---combining pharmacological, interventional, and behavioral modalities---reduce hospital readmissions by an estimated 20--25% when embedded into longitudinal care pathways.

Regulatory Shift Toward Multimodal Analgesia Approaches

The CDC's 2022 Clinical Practice Guideline explicitly recommends multimodal analgesia approaches as first-line treatment, reducing opioid analgesic treatment initiation for chronic non-cancer pain. CMS simultaneously introduced bundled payment models that incentivize hospitals to deploy non-pharmacological pain relief before prescribing opioids.

In Europe, the EMA's Opioid Action Plan (2023) mandated risk-evaluation and mitigation strategies across 27 member states, accelerating demand for interventional pain procedures and device-based alternatives. Payer frameworks increasingly tie reimbursement to durable functional outcomes rather than prescription volumes, reshaping how healthcare systems procure chronic pain therapy solutions.

The total cost of settlements resulting from U.S. opioid litigation exceeds USD 50 billion as of 2024, with Purdue Pharma, Johnson & Johnson, and large distributors suffering the greatest financial burdens. This litigation overhang deters new competitors from investing in opioid analgesic treatment formulations, including abuse-deterrent variants.

Legacy firms in the Pain Management Market have less access to finance as ESG-focused institutional investors progressively filter out businesses with substantial opioid revenue exposure. BlackRock's 2024 stewardship report flagged opioid analgesic treatment exposure as a material governance risk, prompting institutional investors to redirect over USD 12 billion toward companies specializing in multimodal analgesia approaches and device-based chronic pain therapy.

Neuromodulation and Device Innovation

Spinal cord stimulation revenues crossed USD 3.2 billion globally in 2024, with closed-loop systems from Abbott and Medtronic demonstrating 50%+ pain-relief superiority over open-loop predecessors in randomized controlled trials. The FDA's Breakthrough Device Designation pathway has shortened approval timelines for next-generation neuromodulation platforms by 12--18 months, creating a fertile innovation environment. High-frequency stimulation and dorsal root ganglion therapy are now reimbursed in 14 U.S. commercial payer plans, up from just 5 in 2020. The global interventional pain procedures segment alone attracted over USD 4.8 billion in venture and strategic investment during 2023--2024, signaling strong private-sector conviction.

AI-driven dosing algorithms represent the newest frontier in the Pain Management Market. Companies like Kaia Health and PainScale have secured FDA clearances for prescription digital therapeutics that combine cognitive behavioral therapy modules with real-time biometric tracking. A 2024 JAMA study demonstrated that AI-assisted opioid analgesic treatment tapering reduced average morphine milligram equivalents by 37% without increasing pain scores. Payers in Germany and the UK are piloting value-based contracts that tie digital therapeutic reimbursement to 90-day functional outcomes. By 2030, the International Association for the Study of Pain projects that 25% of all chronic pain therapy encounters will involve a digital therapeutic component, up from under 5% in 2025.

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Market Segment Insights

BY MODE OF PAIN MANAGEMENT

Drugs --- Opioids: Dominant pharmacological segment with ~41.0% market share in 2025. Post-surgical and cancer pain demand sustains baseline revenue, though volumes face secular decline in North America and Europe due to regulatory tightening. Abuse-deterrent formulations and cancer palliative care applications represent the remaining growth vectors.

Drugs --- Non-Narcotic Analgesics: USD 28.50 Billion in 2025. NSAIDs, acetaminophen combinations, CGRP inhibitors, gabapentinoids, and SNRIs are gaining share as first-line options for chronic pain therapy in primary care, replacing opioid analgesic treatment monotherapy.

Devices --- Neuro-Modulation: Fastest-growing segment at 10.8% CAGR (2026--2035). Closed-loop spinal cord stimulators, dorsal root ganglion therapy, and high-frequency stimulation systems are redefining interventional pain procedures by offering durable relief without pharmacological side effects. FDA Breakthrough Device designations and expanding payer coverage accelerate adoption.

Devices --- Other Devices: USD 5.20 Billion in 2025. TENS units, radiofrequency ablation systems, and portable non-pharmacological pain relief modalities gaining traction in ambulatory and home-care settings.

BY APPLICATION

Neuropathic Pain: Dominant application with 34.2% revenue share in 2025. Driven by rising diabetic neuropathy prevalence affecting over 537 million adults globally. Multimodal analgesia approaches combining gabapentinoids, topical agents, and neuromodulation are replacing opioid analgesic treatment monotherapy.

Facial Pain & Migraine: Fastest-growing application at 9.4% CAGR (2026--2035). Fueled by CGRP-inhibitor adoption (Aimovig, Ajovy, Emgality) and emerging non-invasive vagus nerve stimulation devices. Represents USD 12.80 Billion in 2025.

Cancer Pain: USD 20.90 Billion in 2025, growing at 5.2% CAGR. Oncology survival improvements extend the duration of chronic pain therapy need, sustaining demand for opioid analgesic treatment in palliative care while expanding access to interventional pain procedures.

Musculoskeletal & Post-Operative Pain: Growing at 4.5% CAGR, reflecting aging-related osteoarthritis burden and expanding ambulatory surgical center volumes.

Other Applications: Fibromyalgia, chronic low back pain, and pediatric chronic pain therapy relying heavily on non-pharmacological pain relief modalities.

BY SETTING OF CARE

Hospitals: Largest segment at ~66.8% revenue share in 2025. Reflecting the concentration of complex opioid analgesic treatment protocols, device implantations, and interventional pain procedures in acute-care settings.

Ambulatory Surgical Centers: USD 12.40 Billion in 2025. CMS reimbursement parity rules enacted in 2024 now allow 14 additional interventional pain procedures to be performed in ASCs rather than hospital outpatient departments, reducing procedure costs by 30--45% and improving patient throughput.

Home Care & Other Settings: Fastest-growing setting at 12.5% CAGR (2026--2035). Remote monitoring, wearable neuromodulation devices, and prescription digital therapeutics enable chronic pain therapy decentralization outside institutional walls.

Rehabilitation Centers: Growing segment integrating physical therapy with multimodal analgesia approaches for musculoskeletal and post-surgical recovery.

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Regional Outlook

North America --- Dominant Market (~35.4% Share, 2025)

The United States generates approximately 82.3% of North American Pain Management Market revenue, underpinned by the world's largest commercial insurance ecosystem and the highest per-capita spend on interventional pain procedures. The Substance Abuse and Mental Health Services Administration (SAMHSA) allocated USD 7.4 billion in FY2024 to opioid-response programs, indirectly accelerating demand for non-pharmacological pain relief alternatives.

The CDC's 2022 Clinical Practice Guideline explicitly recommends multimodal analgesia approaches as first-line treatment, while CMS bundled payment models incentivize hospitals to deploy non-pharmacological pain relief before prescribing opioids.

Europe --- Second Largest (USD 25.10 Billion, 2025)

Europe's Pain Management Market benefits from harmonized regulatory pathways under the EU Medical Device Regulation, which streamlines cross-border commercialization of neuromodulation platforms and interventional pain procedures equipment. Germany leads regionally with 24.8% of European revenue, anchored by its pioneering DiGA fast-track pathway that has approved 5 pain-related digital therapeutics for chronic pain therapy reimbursement.

The UK is growing at 5.3% CAGR on NHS pain management pathway reform, with NICE issuing updated guidance recommending multimodal analgesia approaches over long-term opioid monotherapy. France contributes USD 4.15 Billion in 2025 on biologics reimbursement expansion for CGRP inhibitors and advanced chronic pain therapy. Italy is growing at 4.6% CAGR on ASC-equivalent day-surgery growth.

Asia-Pacific --- Fastest-Growing Region (11.5% CAGR, 2026--2035)

Asia-Pacific is the highest-growth corridor in the Pain Management Market. China holds 38.5% of regional revenue, with the 14th Five-Year Plan allocating CNY 22 billion to pain-specialty departments in county-level hospitals and the National Healthcare Security Administration

expanding chronic pain therapy reimbursement categories in 2024. India is growing at 13.2% CAGR on the back of Ayushman Bharat insurance expansion covering 500 million beneficiaries, with the National Programme for Palliative Care expanding chronic pain therapy access to tier-2 and tier-3 cities.

Japan contributes USD 4.50 Billion in 2025 through aging demographics and robotic surgery integration driving post-operative pain demand. South Korea is growing at 10.8% CAGR on NHIS coverage expansion for interventional pain procedures. ASEAN contributes USD 2.10 Billion in 2025, leveraging medical tourism revenue to upgrade interventional pain procedures infrastructure.

Middle East & Africa --- Emerging Opportunity (7.8% CAGR, 2026--2035)

Saudi Arabia's Vision 2030 initiative anchors the region with 32.5% of regional revenue, including 16 new rehabilitation and pain management centers as part of healthcare diversification strategies. The UAE is growing at 8.5% CAGR on medical tourism and interventional pain procedures centers attracting patients seeking advanced multimodal analgesia approaches unavailable in neighboring markets.

South Africa contributes USD 0.95 Billion in 2025 on National Health Insurance rollout expanding chronic pain therapy access in underserved communities. Egypt is growing at 7.2% CAGR on universal health insurance phase-in.

South America --- Growing Presence (USD 5.70 Billion, 2025)

Brazil anchors South America's Pain Management Market at ~58.2% of regional revenue, with the Unified Health System (SUS) increasingly incorporating chronic pain therapy protocols into primary care guidelines and public health system modernization. Argentina is growing at 5.5% CAGR through private insurance growth for multimodal analgesia approaches. The rest of South America contributes USD 1.20 Billion in 2025 on generic analgesic distribution networks.

Competitive Landscape and Recent Developments

The Pain Management Market exhibits medium concentration, with the top five players collectively holding an estimated 32--38% revenue share. The competitive landscape spans multinational pharmaceutical companies, specialized medical device manufacturers, and emerging digital therapeutics startups. Mergers and acquisitions have intensified since 2023 as large incumbents seek to fill pipeline gaps in non-opioid alternatives and multimodal analgesia approaches platforms. Patent thickets around closed-loop algorithms and electrode array designs create high barriers to entry, with over 1,200 neurostimulation patents filed globally in 2024 alone, concentrating innovation among the top four device makers.

The competitive landscape is stratified between large pharmaceutical companies with broad

chronic pain therapy portfolios navigating opioid litigation exposure, integrated pharma-device models controlling end-to-end interventional pain procedures workflows, and AI-native digital therapeutics startups reshaping non-pharmacological pain relief economics through subscription-based platforms.

KEY COMPANIES AND RECENT MILESTONES

Abbott Laboratories (March 2025): Received FDA approval for its next-generation Proclaim XR closed-loop spinal cord stimulator with AI-adaptive algorithms, advancing non-pharmacological pain relief technology. Estimated revenue share: ~5--8% of global Pain Management Market.

Pfizer Inc. (January 2025): Announced a USD 1.8 billion licensing agreement for a non-opioid sodium channel inhibitor targeting chronic pain therapy, signaling commitment to opioid analgesic treatment alternatives. Estimated revenue share: ~7--10%.

Medtronic plc (October 2024): Launched the Inceptiv closed-loop recharge-free neurostimulator in Europe, expanding multimodal analgesia approaches options for neuropathic pain patients. Estimated revenue share: ~5--8%.

Johnson & Johnson (DePuy Synthes) (2024--2025): Maintains integrated pharma-device model spanning interventional pain procedures, devices, and opioid analgesic treatment, leveraging cross-segment synergies. Estimated revenue share: ~6--9%.

Future Outlook: 2026--2035

By 2030, AI-powered precision pain management will reshape the Pain Management Market by enabling real-time treatment personalization. Machine learning models trained on millions of patient-reported outcomes will predict opioid analgesic treatment response profiles, flagging patients at high addiction risk before the first prescription is written.

The WHO estimates that AI-assisted clinical decision support could reduce inappropriate opioid prescriptions by 40% globally by 2032, driving demand for non-pharmacological pain relief alternatives and multimodal analgesia approaches. CYP2D6 and CYP3A4 genotyping now guides opioid analgesic treatment selection at over 200 U.S. health systems, reducing adverse drug events by up to 30%, with adoption expected to expand globally as testing costs decline.

Closed-loop neuromodulation platforms will create an USD 8+ billion addressable opportunity by 2032, with next-generation spinal cord stimulators that automatically modify electrical parameters based on real-time neural feedback. These systems lessen patient burden and enhance results for chronic pain therapy, positioning the device segment for faster growth.

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