Non-opioid Pain Treatment: Global Markets to 2022

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• The global market for non-opioid pain treatment totaled $9.9 billion in 2017 and is estimated to reach $22.6 billion by 2022, growing at a compound annual growth rate (CAGR) of 18.0% for the period of 2017-2022.

• Medical cannabis market for non-opioid pain treatment totaled $7.3 billion in 2017 and is estimated to reach $19.8 billion by 2022, growing at a CAGR of 22.2% for the period of 2017-2022.

• Omega 3 fatty acid market for non-opioid pain treatment totaled $911 million in 2017 and is estimated to reach $966 million by 2022, growing at a CAGR of 1.2% for the period of 2017-2022.
Chapter 1: Introduction

Study Goals and Objectives
This BCC Research report, Non-opioid Pain Treatment: Global Markets to 2022, provides an overview of products included in this market, and a detailed analysis of the markets and market opportunities. The study includes information about significant products categories, issues and trends, market influences, regulatory issues and other information affecting the pain management industry, and more specifically, the non-opioid treatment market.

Reasons for Doing This Study
This study will provide the reader with the knowledge to adequately view and assess alternative areas of pain treatment that are penetrating the conventional pain treatment market. In response to the new treatment areas, the industry is faced with unprecedented challenges regarding patient quality of life, treatment liability and government limitations and compliance. The study provides insights into the market potential in the segments discussed in the report as these areas are the most pressing in terms of their potential benefits and how they compare when being evaluated against prescription opioid therapies.

The report is designed to provide the reader with a background of the pain management industry and current factors influencing growth and provide decision-makers with the tools to make decisions regarding expanding into the newest areas of pain management treatment in regard to non-opioid treatments.

Scope of Report
This BCC Research report is designed to be a helpful business tool that will provide a thorough evaluation of the markets for pain management. The geographical scope of this study is global. This study addresses acute versus chronic pain, treatments and regulatory issues facing healthcare workers. Also provided is detailed information based on product categories, use of products, forecasts and competitive analyses.

The report identifies five general product segments for non-opioid treatment of pain:

- Medical cannabis treatments.
- Capsaicin-derived treatments.
- Menthol-containing treatments.
- Omega 3 fatty acid-containing treatments.
- Botulinum toxins.

Within the segment several sub-segments are discussed as they pertain to each product segment; diseases or disorders are the basis for these sub-segments, including:
• Arthritis.
• Cancer—brain, breast, colorectal, leukemia/lymphoma, melanoma, prostate, others.
• Dental.
• Epilepsy.
• Fibromyalgia.
• Migraine.
• Multiple sclerosis.
• Surgical.

A regional analysis of these product segments is also provided, including the specific countries listed below and including countries not listed as a “rest of the world” market.

• Argentina.
• Australia/New Zealand.
• Brazil.
• Canada.
• China.
• France.
• Germany.
• Italy.
• Japan.
• Mexico.
• Russia.
• Spain.
• United Kingdom.
• United States.

Each market segment provides detailed information based on product categories, product use, current market value and forecasts.

Not covered in the report are drugs or devices that are considered “conventional” in professional treatment guidelines that are due to either controversial issues such as those with medical cannabis or those that are not commonly prescribed or recommended due to a lack of clinical data, education or other factors.

Information Sources

Information sources used to compile this report include:

• AbbVie Inc.
• Acorda Therapeutics Inc.
• Allergan PLC.
• Australian Department of Health.
• Bedrocan BV.
Methodology

This report is based on extensive primary research, including interviews with market participants, pain management physicians and care providers, government personnel and researchers. Secondary research is used to supplement primary methods, which include insurance and reimbursement databases, government health and lifestyle databases, relevant journals, company literature and investment reports. The report is global in scope with a special emphasis on major global markets such as the United States, Canada, France and Germany. Market data is based on 2017 market conditions, using 2017 as the base year. Historical data is provided for 2016 while forecast data is provided for 2022.

Geographic Breakdown

In this report, the geographic regions considered for market analysis are divided into four broad regions:

- North America.
- Europe, Middle East, Africa (EMEA).
- Asia-Pacific.
- Latin America.

**Table A**  
**Major Countries, by Region**

<table>
<thead>
<tr>
<th>North America</th>
<th>EMEA</th>
<th>Asia-Pacific</th>
<th>Latin America</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>Egypt</td>
<td>Australia</td>
<td>Argentina</td>
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<tr>
<td>United States</td>
<td>France</td>
<td>China</td>
<td>Brazil</td>
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<td>South Korea</td>
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<td>Ukraine</td>
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<td></td>
<td>United Kingdom</td>
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<td></td>
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</tbody>
</table>

Source: BCC Research
Non-opioid Pain Treatment Market, by Product Segment

- Medical Cannabis
- Capsaicin-Derived
- Menthol-Containing
- Omega-3 Fatty Acid-Containing
- Onabotulinumtoxin A, etc.
Non-opioid Pain Treatment Market, by Therapeutic Application

- Cancer
  - Brain
  - Breast
  - Colorectal
  - Leukemia/Lymphoma
  - Melanoma
  - Prostate
  - Others
- Neuropathic/Neurologic
  - Diabetes
  - Epilepsy
  - Migraine
  - Multiple Sclerosis
  - Others
- Orthopedic/Musculoskeletal
  - Arthritis
  - Fibromyalgia
  - Others
- Other
  - Dental
  - Surgical
  - Other
Non-opioid Pain Treatment Market, by Global Region

North America
- Canada
- United States

EMEA
- France
- Germany
- Italy
- Russia
- Spain
- United Kingdom
- Australia/New Zealand

Asia-Pacific
- China
- Japan

Latin America
- Argentina
- Brazil
- Mexico
**Analyst’s Credentials**

Melissa Elder is an experienced healthcare market analyst specializing in medical treatments, equipment and devices. Ms. Elder holds a B.S. in Business Management and is currently working to complete her M.B.A. in Health Care Management. Ms. Elder has been involved in the healthcare industry since 1996, providing more than 20 years of industry expertise. She has specialized in market research for the past 18 years, focusing on the areas of advanced medical technologies, biological products and animal health. In-depth analysis into more than 100 health-related topics has given Ms. Elder substantial insight into industry dynamics, market influences and the future direction of various health markets. Her work in the medical community, including emergency room medical training and healthcare information system coordination, has enhanced her ability to provide insight into many healthcare specialties. She has authored several industry specific documents and is a well-respected contributor to the market research community. Her writings are published in magazines, newspapers and professional journals. She is also an experienced custom market research writer who has worked with a large variety of clients in many fields who require innumerable variations to their research documents.

**Related BCC Research Reports**

- BIO022H *Botanical and Plant-Derived Drugs: Global Markets.*
- HLC026F *The Global Market for Pain Management Drugs and Devices.*
Chapter 2: Summary and Highlights

Market Overview

The global non-opioid pain treatment market, which focuses on alternative non-opioid treatments, reached a total market value of nearly REDACTED in 2017. The market is divided into five general segments for this report, including medical cannabis, capsaicin-derived treatments, menthol-containing treatments, omega-3 fatty acid-containing and botulinum toxins.

Various findings specific to each segment are discussed below:

Medical cannabis

- Largest alternative non-opioid market segment, accounting for a 73% market share.
- The United States is the largest market for medical cannabis, accounting for 50% of global sales.
- The street cost of cannabis is the highest in Japan (it is illegal for all uses in Japan).
- Medical cannabis is most often used to control pain in orthopedic and musculoskeletal conditions. Arthritis and fibromyalgia are the most common individual indications. About 57% of sales are for this group of indications.
- Increasing use in neuropathic pain has shown effectiveness.
- Growing number of medical cannabis clinical trial listings.

Capsaicin-derived treatments

- Smallest market segment, accounting for just 3% of the global non-opioid pain treatment market.

Menthol-containing treatments

- Second-largest alternative non-opioid market segment, accounting for a 9% market share.
- Menthol-containing treatments have been shown to be effective in treating neuropathies.
- Increasing rate of diabetes and other conditions with high prevalence of neuropathies will fuel growth.
- Major market segment in Latin American pain treatment markets.

Omega-3 fatty acid-containing

- Accounts for 9% of the global non-opioid pain treatment market.
- Aging populations will be a strong driver for growth.
- Increasing orthopedic conditions and injuries will support growth.
- Major segment in Asia-Pacific pain treatment markets, accounting for 30% to 50% of non-opioid pain treatment sales in developed countries.
Botulinum toxins

- Accounts for 5% of the global non-opioid pain treatment market.
- Botox is the leading product in the segment and is marketed by Allergan.
- The U.S. market is the largest market due to the availability and reimbursement of Botox.
- Global push for education in alternative migraine treatments and awareness.

**Summary Table**

Global Market for Non-opioid Pain Treatments, by Product Segment, Through 2022

($ Millions)

<table>
<thead>
<tr>
<th>Product Segment</th>
<th>2016</th>
<th>2017</th>
<th>2022</th>
<th>CAGR% 2017–2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical cannabis</td>
<td>4,843</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Menthol-containing</td>
<td>919</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Omega 3 fatty acid-containing</td>
<td>900</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Botulinum toxins</td>
<td>511</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capsaicin-derived</td>
<td>250</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>7,423</td>
<td></td>
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</tbody>
</table>

Source: BCC Research
Regional Market Summary

The market is also evaluated in terms of regional opportunities and market values. In 2017, the global non-opioid pain treatment market was dominated by sales in North America, largely due to acceptance and growth in the United States; however, growth in Canada is also significant to the market and continues to add value. The market increased to a value of REDACTED billion in 2017, up from REDACTED the previous year. The North American market is expected to increase at a CAGR of REDACTED and generate REDACTED by 2022.

The EMEA region, which includes Europe, the Middle East and Africa supported a market worth REDACTED in 2017, representing 36% of the global market. Germany is the largest market in the region with sales of about REDACTED.

The Asia-Pacific market for non-opioid pain treatments reached REDACTED during 2017, representing roughly 21% of the global market. The region varies in its distribution of sales by product type due to various laws and guidelines there. Overall, China is the largest market in the region.

The smallest region is Latin America, which accounted for 4% of sales, or REDACTED, in 2017. Argentina is the largest market with 42% of the regional total due its socially acceptance and high use of medical cannabis.
Drivers and Restraints

The health care industry as a whole is affected by common factors such as aging populations, increasing populations, increases in chronic diseases, lifestyle choices affecting health conditions, reduced medical professionals, rural health challenges and the list goes on. The non-opioid pain treatment market is not excluded from these issues, and in many areas, can provide benefits to a pain treatment plan. The industry does continue to struggle with government restrictions, unproven efficacy in a clinical setting and official regulatory approval in most cases. There are, however, several areas where non-opioid pain therapies are driving the market.

Pain treatment is more multidisciplinary than ever and supports the use of alternative non-opioid treatments, either as primary pain management modalities or as adjunctive therapies.

A concentrated effort is needed to educate providers and payors about the value and potential cost savings of effective pain management. As the industry continues to focus on cost-effective pain management, finding treatments that have minimal side effects and control pain effectively will be the most valuable to providers and patients. Many studies have shown good pain management reduces complications and hospital lengths of stay, with significant savings that far exceed the cost of the technology or drugs used.

Changes in government regulation regarding alternative treatments, such as medical cannabis, are expected to continue. Relaxed regulation regarding the use of both the medical and recreational use of cannabis show a growing acceptance of the substance in general.

The health industry is shifting to a patient outcomes-based treatment system, building guidelines for treatment and compensating payors based on performance measurements. A focus on patient outcomes research may provide a platform for alternative therapies.
Figure 1
Non-opioid Pain Management Market Drivers and Restraints

Drivers
- Multidisciplinary approach supports non-opioids as a primary or additional treatment
- Lower cost for treatment in most cases
- Relaxing government regulations
- Research supports use of non-opioid treatments
- Lower side-effects compared to conventional therapies

Restraints
- Government regulation
- Abuse in recreational use of cannabis
- Many alternative therapies not FDA or CE approved

Source: BCC Research
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