

# The US Chronic Pain Market – Focus on Opioids: Trends & Opportunities (2014-19)

November 2014



# The US Chronic Pain Market – Focus on Opioids

## Scope of the report

The report titled “The US Chronic Pain Market – Focus on Opioids: Trends and Opportunities (2014-2019)” provides an in-depth analysis of the United States chronic pain therapy market (including medication, surgeries and therapies) with detailed analysis of market sizing and growth and market share of the various drugs involved in the treatment of chronic pain. The report also assesses the key opportunities in the market and outlines the factors that are and will be driving the growth of the industry. Growth of the overall chronic pain therapy market has also been forecasted for the period 2014-19, taking into consideration the previous growth patterns, the growth drivers and the current and future trends. Further, key players of the industry like Zogenix Inc., Egalet Corporation and Nektar Therapeutics are profiled.

## Segment Coverage

- Oxycodone
- Hydrocodone
- Morphine
- Hydromorphone
- Fentanyl
- Dihydrocodeine
- Methadone

# The US Chronic Pain Market – Focus on Opioids

## **Executive Summary**

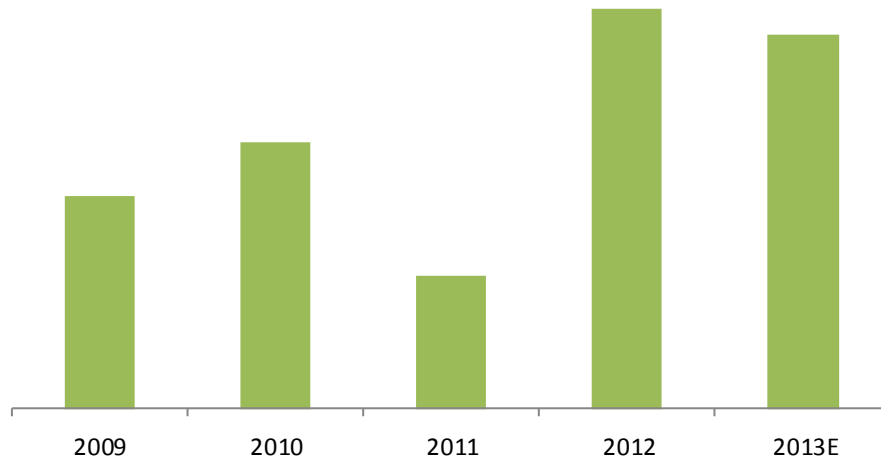
Chronic pain, defined as pain that lasts longer than six months and about 100 million Americans suffer from chronic pain that could be mild or agonizing, episodic or continuous, merely inconvenient or totally incapacitating.

The US chronic pain therapy market is expected to experience slow pace of growth in the near future. The major opioids used for medication in chronic pain are Oxycodone, Hydrocodone, Fentanyl, Methadone, Morphine, Hydromorphone and Dihydrocodeine. Compared to other opioids, hydrocodone products, the most commonly prescribed opioid and the most commonly prescribed pharmaceutical products in the United States, are growing at a substantial pace in the overall chronic pain therapy market. In the oxycodone business domain, the expected launch of Egalet 002 in the second quarter of 2015 by the leading player Egalet will change the dynamics of this domain as currently Oxycotin dominates the oxycodone market.

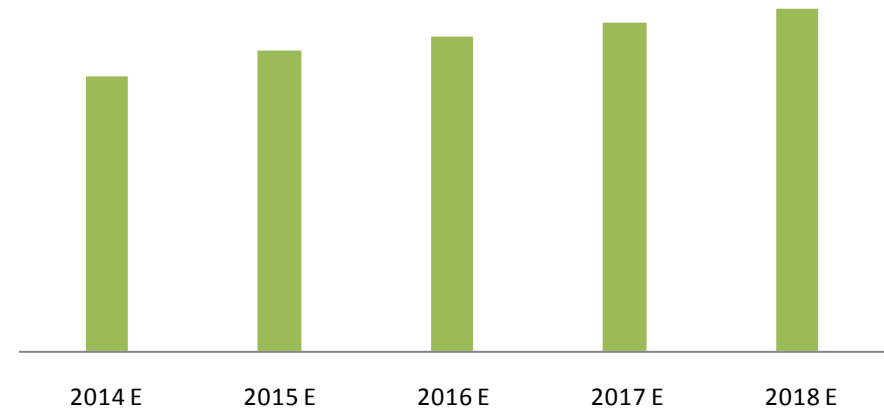
# The US Chronic Pain Market – Focus on Opioids

About 100 million Americans suffer from chronic pain, defined as pain that lasts longer than six months. Chronic pain can be mild or excruciating, episodic or continuous, merely inconvenient or totally incapacitating. Chronic pain treatment depends on the individual patients, their diagnosis and their pain severity.

**US Chronic Pain Market 2009-2013E**  
(in US\$ billions)



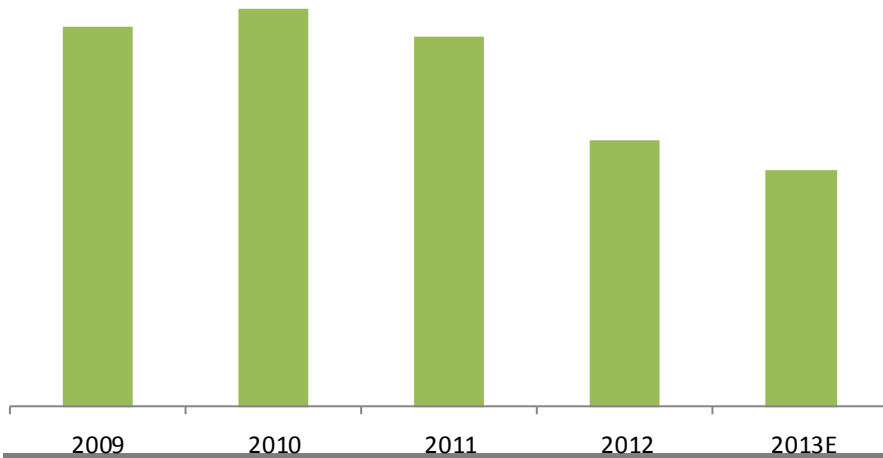
**US Chronic Pain Market 2014F-19F**  
(in US\$ billions)



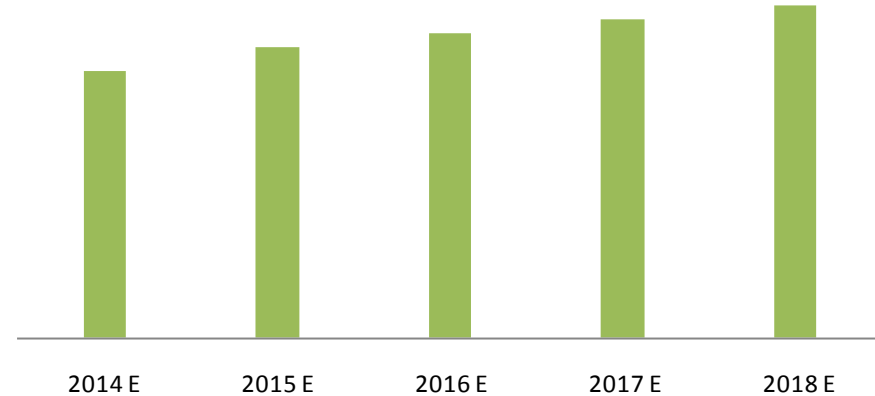
- Market size of the US Chronic Pain Therapy is expected to reach to US\$..... billions in the year 2019, from US\$..... billions in 2014 by growing at a CAGR of.....%.
- Growth in the market is due to .....

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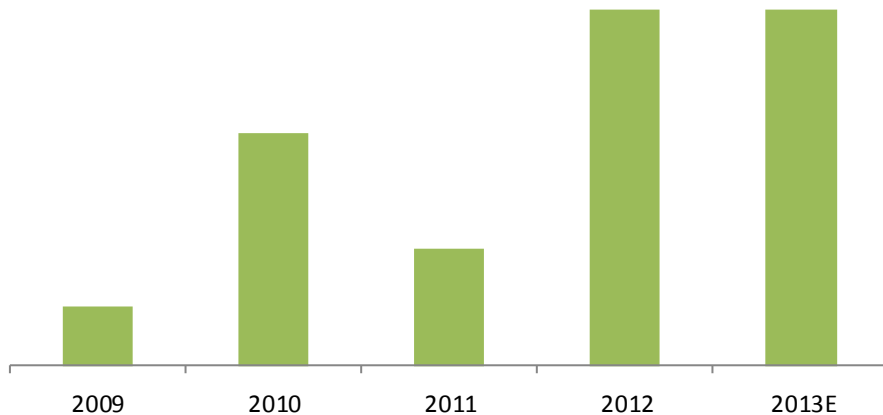
**US Oxycodone Market: by value- 2009-2013E**  
(in US\$ billion)



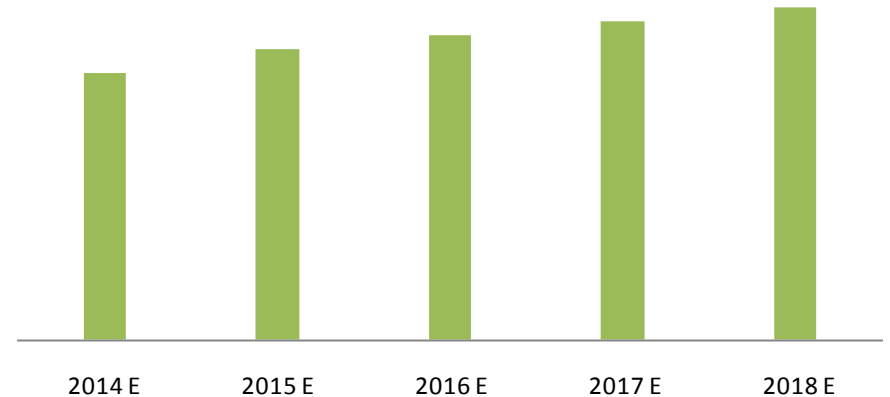
**US Oxycodone Market: by value- 2014-19F**  
(in US\$ billion)



**US Methadone Market: by value- 2009-13E**  
(in US\$ million)



**US Methadone Market: by value- 2014-19F**  
(in US\$ million)

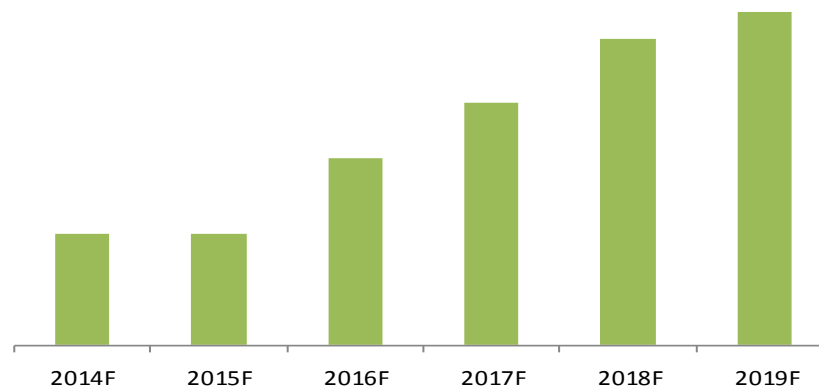


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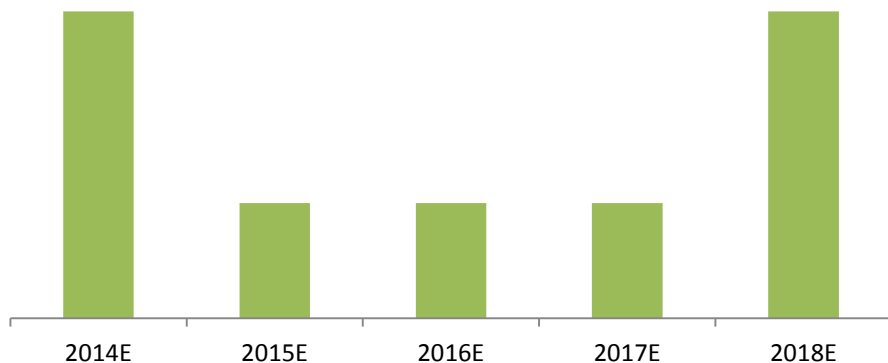
**US Morphine Market: by value- 2009-13E (in US\$ million)**



**US Morphine Market: by value- 2014F-2019F (in US\$ million)**



**US Hydromorphone Market: by value- 2014F-2018F (in US\$ million)**



**US Dihydrocodeine Market: by value- 2014F-18F (in US\$ billion)**

