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# Press Release

## **17 Million Americans Now Use Chronic Pain**

### **Programs, Devices, and Drugs**

#### ***Market Grows To \$19.6 Billion***

**Tampa FL, September 20, 2010:** Marketdata Enterprises, Inc., a leading independent publisher of market studies about service and healthcare sectors since 1979, has released a new 246-page report entitled: [Chronic Pain Management Products & Services: A Market Analysis](#). This report is the 7th edition analysis of a little-researched medical specialty. The study examines the historical, current and projected status, operating performance, and demand for pain management programs, devices and drugs, from 1985 through 2014.

According to Research Director John LaRosa: "...An estimated 40-60 million Americans suffer from chronic, recurring pain caused by: lower back problems, arthritis, repetitive motion injuries, migraines, cancer and other conditions. The potential untapped market is huge, as America ages and obesity takes a toll. However, the field has degenerated into turmoil as accredited multidisciplinary programs compete with solo anesthesiologists, illegal "pill mills" selling Oxycontin, and other MDs providing injections after taking a weekend course. Profits, not patient care and effective outcomes, are the focus. And, a majority of consumers don't know how to find legitimate pain management practitioners."

#### **Major Findings:**

- **Market Size:** Marketdata estimates that the value of the U.S. market for pain management products and services by: clinics, programs, solo anesthesiologists, other MDs, chiropractors, pain drugs and devices reached \$19.6 billion in 2009. 8.0% yearly growth is projected to 2014, to \$27 billion.
- **Market Structure:** The field is comprised of 3,900 anesthesiologists, another 4-5,000 other MDs (general practitioners, family doctors, physiatrists) that give injections, 366 accredited pain

programs/clinics (mostly hospital or university-based), and 700+ pill mills. More **anesthesiologists** continue to enter the field, with 3,900 now active in pain therapy. To date, 4,100 anesthesiologists have been certified in pain therapy.

- **Pain-killing drugs** such as Oxycontin constitute at least a \$2.9 billion U.S. market that has been growing 20% per year. Abuse is rampant and illegal “pill mills” have soared in number in the 12 states with no drug monitoring databases (PDMPs), especially in Florida. Bogus scripts are written by crooked MDs and pills are re-sold on the black market for huge profits in other states. The DEA is cracking down but it takes a long time to actually indict the scam artists. In the meantime, pill mills will likely just relocate to states without PDMPs. It’s a mess.
- The U.S. market for pain management devices (spinal cord stimulators, TENS machines, implantable pumps) is estimated to be worth \$1.5 billion and is growing 6.6% per year. New pain treatments such as neuromodulation are emerging. Boston Scientific, St. Jude Medical and Medtronic capture most of this market segment.
- An estimated **17.6 million Americans** took some action for their chronic pain last year, up from 4.8 million in 1998. Back and neck pain are the most common conditions. Clinical pain organizations estimate the cost of lost work time at \$80 billion/year.
- Marketdata estimates that **8.7 million “procedures”** such as nerve blocks and epidural injections were performed last year (4.7 million in the Medicare population alone). This is up substantially, fueled by an annual 11.6% increase in chronic low back pain among Americans. A typical injection in a doctor’s office may cost \$100-150, and usually 3 treatments are needed. Critics argue that this is short-term relief at best, and that it doesn’t get to the root of the problem.
- **Multidisciplinary programs** that use large staffs and different specialties are dwindling in number but have very good reputations. They held their own during the recession, but their average price tag of \$12,000-\$15,000+ limits the number of clients that can afford it.
- Demand for chronic pain treatment will be with us for some time, as Americans age, they continue to suffer from obesity, and wounded war vets return from Iraq and Afghanistan. over the next four years we should see the closure of many illegal pill mills as DEA crackdowns continue and more states establish prescription drug monitoring programs, new pain treatment techniques emerging, and the

development of more abuse-resistant painkilling drugs and more generics on the market (in 2013). The shift toward more outpatient care should continue.

- Marketdata analysts estimate that the caseloads of anesthesiologists in pain therapy grew by 45% between 2003 and 2009, double the rate of growth of multidisciplinary programs.
- There is a war raging between various pain societies/associations, anesthesiologists vs. multidisciplinary programs, accredited vs. non-accredited practitioners, and the DEA vs. pill mills. As a result, many pain sufferers may not be getting the treatment or medications they need.

**Editor's Note:** Chronic Pain Management Products & Services: A Market Analysis, published in September 2010, is an independently researched study. It contains 38 tables and charts, is 246 pages in length, and costs \$1,995. It's also sold by individual chapters at lower cost. A free brochure/table of contents is available by mail, Fax or email. Contact: Marketdata Enterprises, Inc., 8903 Regents Park Drive, Suite 120, Tampa, FL 33647 (marketdataent@yahoo.com). Marketdata studies are available online via: **MarkIntel**, **Profound (Dialog)**, and **Marketresearch.com**. Mr. LaRosa is available for interviews.

A condensed 35 pp. **Executive Overview** of the report is available to the general public for \$79,

via the Marketdata website's secure e-commerce store, or by calling directly.

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