

# Non-Opioid Treatments: Surgical and Post surgical Pain

## CASE STUDY

Feb 12, 2025

# A Comprehensive analysis of the clinical and commercial landscape of non-opioid drugs for surgical and post surgical pain management.



## Business Objective

Our client specifically sought to acquire insights into the clinical and commercial landscape within the domain of non-opioid treatments for surgical and post-surgical pain management, with a particular focus on most recent clinical trials, current market size, retail pricing, and identifying key business partners for products already launched by the companies.



## Project Breakthrough

- What are the non-opioid based drugs offered by different companies in the field of surgical and post-surgical pain management ?
- What are the number of ongoing clinical trials related to non-opioid treatment for surgical and post-surgical pain management, and in which phases are these trials (e.g., Phase 1, Phase 2, Phase 3)?
- What are the active drugs related to non-opioid treatment for surgical and post-surgical pain management currently being tested in clinical trials?
- How has the trend of clinical trials for non-opioid pain treatments changed in last 7 years?
- What is the current market size for non- opioid postoperative pain management products?
- How do retail prices vary across different companies?
- How have these companies grown their businesses through external activities like partnerships, clinical trials, grants, publications, funding, approvals, and product launches?

# Wissen APPROACH

Wissen carried out thorough secondary research about clinical and commercial landscape for non-opioid treatments for surgical and post surgical pain management.

## Secondary Research

### Clinical trial Analysis

### Product Analysis

What question it answered?

This analysis sought to understand the landscape of clinical trials in surgical and post-surgical pain management. It assessed **study status** (e.g., **recruiting, active, completed, terminated**), **study types** (**interventional vs. observational**), **active drugs used** (**Ropivacaine, Vocacapsaicin, Bupivacaine, Imrecoxib** etc.), **phases of development**, and **treatment types** (**Individual, Combination**) to identify promising approaches for enhanced pain relief.

This analysis yielded the following answers:

- Different type of active drugs used in non-opioid based surgical and post surgical treatment including (**Bupivacaine, Imrecoxib, Taplucainium, Ropivacaine, Suzetrigine** etc.)
- **Bupivacaine** and **Ropivacaine** being the **major active drugs** used by companies and **Jiangsu Hengrui Pharmaceuticals Co., Ltd.** is the **leading company** that incorporates the **highest number of active ingredients** in its drug formulations.

How it helped the client?

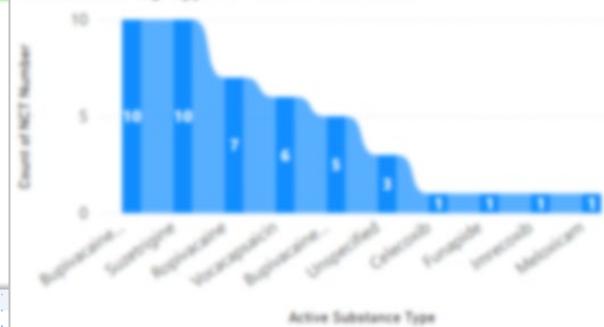
This thorough clinical trial analysis provides clients with essential insights into treatment progress, unmet research needs, and potential breakthrough therapies. This knowledge enables them to make **more informed decisions** regarding **strategic planning, clinical practice improvements**, and product innovation in the changeable pain management landscape.

These insights offer a wide range of options regarding active ingredients for non-opioid pain management, along with identifying the leading company in the field. This information will ultimately assist the client in **making informed decisions** for their product development and **maintaining competitiveness** in the market.

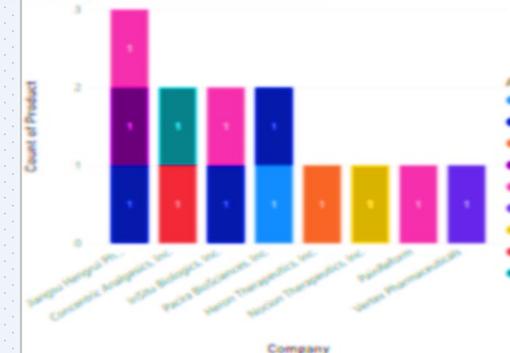
Distribution by Study Status



Distribution by Type of Active Substance



Company and their product distribution



Development Phase Vs. Product Count



# Wissen APPROACH

Wissen carried out thorough secondary research for analyzing market and strategic for non-opioid treatments for surgical and post surgical pain management.

## Secondary Research

### Market landscape Analysis

### Strategic Activity

What question it answered?

The analysis answered the following question:

- **Product revenue(USD million)**-Sum of product revenue are increasing over the year.
- **Year on year growth rate(%)**(In 2022-2023 the sum of growth rate for Zynrelef varies from 251.72% to 73.53% and for Exparel 6% to 0.22%)
- **Retail price of the product**-Varies according to company.

This analysis delivered insights into market **access**, **potential growth areas**, **investment priorities**, and **risk management**, ultimately fostering new innovations and supporting strategic decision-making.

How it helped the client?

This information empowered the client to make **informed decisions** regarding **strategic investments** and to **forecast future revenues**. Additionally, it provided insights into market dynamics and facilitated effective **financial management**.

These insights enable clients to make **informed strategic decisions** that **enhance competitiveness** and **drive growth**.



Company name	Product	Type of activity	Partner	Date	Description
Pacira BioSciences, Inc.	Exparel   Iversys® system	Partnership	Ashfield Engage	03 June 2021	Ashfield Engage, a division of UDG Healthcare, has been chosen by management products in select European countries. This partnership marks furthering efforts to offer non-opioid alternatives in pain cal
Concentric Analytics, Inc.	CA-008	Clinical Activity		26 January 2021	Concentric Analytics announced positive Phase 2 trial results for a significant 52% reduction in opioid use two weeks post-surgery.
Concentric Analytics, Inc.	CA-008	Grant		07 December 2017	Concentric Analytics announced that the FDA has granted Fast Tra
Concentric Analytics, Inc.	CA-008	Grant		11 September 2018	Concentric Analytics announced that the U.S. FDA has granted Bre
Concentric Analytics, Inc.	CA-008	Publication		24 July 2024	Concentric Analytics announced the publication of Phase 2 clinical demonstrated that a single dose of vocacapsaicin significantly redu company is now advancing preparations for Phase 3 trials.
Concentric Analytics, Inc.	CA-008	Partnership	Evolution Research Group   University of Rochester Medical Center	02 February 2022	Concentric Analytics has announced two pivotal Phase 3 clinical co with Evolution Research Group, a prominent postsurgical pain study to conduct its registration trials.
Concentric Analytics, Inc.	CA-008	Funding		26 January 2022	Concentric Analytics has completed a \$20 million convertible note appointment of Paul R. Carter and Jonathan R. Lynch to its board of pain therapy, vocacapsaicin.
Concentric Analytics, Inc.	CA-008	Clinical Activity		01 November 2017	Concentric Analytics has initiated a Phase 1b clinical trial for CA-008 randomized, double-blind trial, involving 32 patients undergoing bu are expected in Q1 2018.
Concentric Analytics, Inc.	CA-008	Clinical Activity		16 July 2018	Concentric Analytics has launched a Phase 2 clinical study of CA-0
Concentric Analytics, Inc.	CA-008	Funding	Oracle Investment Management   Verrock Healthcare   Caven Healthcare   Kern Whelan Capital	21 May 2019	Concentric Analytics has successfully raised \$76 million in Series B therapeutic for post-surgical pain. The funding will also support the osteoarthritis. The round was led by Oracle Investment Management Capital.
Concentric Analytics, Inc.	CA-008	Clinical Activity		08 August 2024	Concentric Analytics presented new clinical data on vocacapsaicin, data from Phase 2 trials in total knee arthroplasty (TKA) and h



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