

### Pain Management Sector Update

- Pain management encompasses the diagnosis, treatment and ongoing care of acute and chronic pain conditions through pharmacologic therapies, interventional procedures, physical rehabilitation, and behavioral health approaches.
- Approximately 50 million American adults suffer from chronic pain, with 80 million prescribed a medication for moderate-to-severe acute pain each year. With an aging population driving rising rates of musculoskeletal, neuropathic, and post-surgical pain, demand for comprehensive pain management services continues to intensify.
- Concurrently, the opioid crisis has fundamentally reshaped prescribing behavior, as roughly 85,000 patients annually develop opioid use disorder following an initial acute pain prescription, creating urgency among providers and payers to adopt multimodal, non-opioid treatment protocols. The recent FDA approval of Journavx (suzetrigine) – the first new class of pain medication in over 20 years – represents a landmark shift toward mechanism-targeted, non-addictive solutions, while the NIH HEAL Initiative has invested billions of dollars across more than 2,000 research projects to accelerate the development pipeline of novel therapeutics and devices.
- As pain management providers seek to move beyond episodic, medication-centric care, many are building interdisciplinary programs that integrate physical therapy, cognitive behavioral therapy, neuromodulation, and patient self-management into longitudinal treatment plans.
- Overall, the convergence of a growing chronic pain population, a systemic pivot away from opioid reliance, and an accelerating wave of therapeutic innovation creates a durable and expanding opportunity for well-positioned pain management platforms.

### Select Recent EdgePoint Healthcare Transactions



**For more information and insights, please contact the EdgePoint Healthcare Group:**



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# Pain Management | April 2026

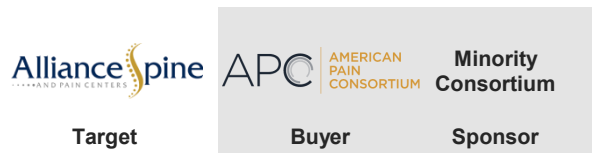
## Recent Strategic Transaction Profiles

### DxTx Pain & Spine | SEPA Pain & Spine



- **March 2026** – DxTx Pain & Spine, a physician-founded platform focused on supporting high-quality pain management practices across the country, has acquired SEPA Pain & Spine.
- SEPA Pain & Spine is a Horsham, Pennsylvania-based comprehensive interventional pain management practice.

### American Pain Consortium | Alliance Spine



- **February 2026** – American Pain Consortium, a provider of clinical and operational support to pain management clinics, has acquired Alliance Spine and Pain Management.
- Alliance Spine and Pain Management is an Atlanta, Georgia-based premier multidisciplinary pain management practice.

### Summit Spine | Savannah Pain Management



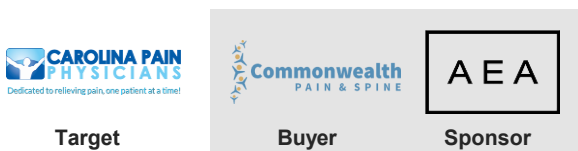
- **January 2026** – Summit Spine & Joint Centers, a minimally invasive spine and chronic pain management platform with locations across the Southeastern U.S., has acquired Savannah Pain Management.
- Savannah Pain Management is a Savannah, Georgia-based interventional pain management practice.

### Resolve Pain | The Spine Diagnostic Center



- **January 2026** – Resolve Pain Solutions, a physician-led interventional pain management platform, has acquired The Spine Diagnostic & Pain Treatment Center.
- The Spine Diagnostic & Pain Treatment Center is a Baton Rouge, Louisiana-based interventional pain management practice.

### Commonwealth Pain | Carolina Pain



- **November 2025** – Commonwealth Pain & Spine, a network of pain management physicians focused on expanding access to advanced chronic pain treatment, has acquired Carolina Pain Physicians.
- Carolina Pain Physicians is a North Charleston, South Carolina-based interventional pain management practice.

### Clearway Pain | West Alabama Spine



- **July 2025** – Clearway Pain Solutions, a leading interventional pain management platform, has acquired West Alabama Spine and Pain Specialists.
- West Alabama Spine and Pain Specialists is a Northport, Alabama-based full-service interventional pain management practice.

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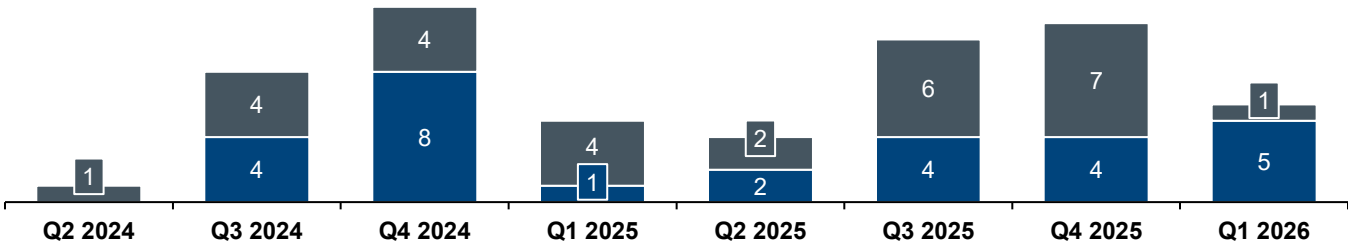
Date	Target	Buyer	Financial Sponsor
Mar-26	SEPA Pain & Spine	DxTx Pain & Spine	Multiple Buyers
Feb-26	Alliance Spine and Pain Management	American Pain Consortium	Multiple Buyers
Jan-26	Savannah Pain Management and Savannah Pain Center	Summit Spine & Joint Centers	Revelar Capital
Jan-26	The Spine Diagnostic & Treatment Center	Resolve Pain Solutions	Compass Group Equity Partners
Jan-26	Crespo Injury Care Center	Physician Partners of America	--
Dec-25	Peninsula Health Center	Prosperous Health	--
Dec-25	Traditions Health	Multiple Buyers	--
Nov-25	Carolina Pain Physicians	Commonwealth Pain & Spine	AEA Investors
Nov-25	Piedmont Interventional Pain Care	Commonwealth Pain & Spine	AEA Investors
Nov-25	Louisville Orthopaedic Clinic	Baptist Health	--
Sep-25	Stoneridge Hospice	Uplift Hospice	--
Sep-25	Clinton Memorial Hospital	TriHealth	--
Aug-25	PainTEQ	Signet Healthcare Partners / Windham Capital	--
Aug-25	Preferred Excellent Care	AIS HealthCare	Blackpoll Capital Partners
Jul-25	West Alabama Spine and Pain Specialists	Clearway Pain Solutions	NexPhase Capital
Jul-25	Lubbock Spine Institute	Integrated Pain Associates	Triton Pacific Capital Partners
Jun-25	Tier 1 Orthopedic and Neurosurgical Institute	Campbell Clinic	--
Apr-25	Integrated Medical Services	Privia Health Group (NAS: PRVA)	--
Mar-25	Summit Spine & Joint Centers	Revelar Capital	--
Mar-25	Gateway Medical Pharmacy	Medicare (TSX: MPH)	--
Jan-25	Eastern Neurodiagnostic Associates	Clearway Pain Solutions	NexPhase Capital
Jan-25	Carolinas Center For Advanced Management of Pain	Commonwealth Pain & Spine	AEA Investors

Transactions are representative of Pain Management.  
Source: Pitchbook (as of April 8, 2026).

## Quarterly Transaction Volume

(# of transactions)

■ Strategic M&A ■ Private Equity



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## Select Sponsor-Backed Platforms

<p>August 2025</p> <p>Signet / Windham</p>	<p>March 2025</p> <p>Revelar Capital</p>	<p>January 2024</p> <p>A Minority Consortium</p>	<p>January 2023</p> <p>Triton Pacific Capital</p>
<p>September 2022</p> <p>Compass Group Equity</p>	<p>May 2022</p> <p>Iron Path Capital</p>	<p>January 2022</p> <p>AEA Investors</p>	<p>September 2011</p> <p>Sentinel Capital Partners</p>