

Global Post Operative Pain Management Market - 2025 -2033

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Abstracts

Postoperative Pain Management Market Size & Industry Outlook

The global postoperative pain management market size reached US\$ 41.17 Billion in 2024 from US\$ 39.26 Billion in 2023 and is expected to reach US\$ 65.36 Billion by 2033, growing at a CAGR of 5.4% during the forecast period 2025-2033. The market is expanding steadily driven by rising surgical volumes and an aging population. Innovation such as Pacira's EXPAREL, a long-acting liposomal bupivacaine that reduces opioid reliance, and Heron's ZYNRELEF, which combines bupivacaine with meloxicam for extended postsurgical pain relief. At the same time, regulatory and clinical pressure to curb opioid prescriptions is accelerating the shift toward multimodal analgesia and non-opioid regimens, reflecting both patient safety concerns and payer priorities.

Key Market Highlights

North America dominates the postoperative pain management market with the largest revenue share of 42.72% in 2024.

The Asia Pacific is the fastest-growing region and is expected to grow at the fastest CAGR of 5.7% over the forecast period.

Based on drug type, the opioids segment led the market with the largest revenue share of 42.14% in 2024.

The major market players in the postoperative pain management market are Pacira Pharmaceuticals, Inc., Heron Therapeutics, Inc., Mallinckrodt

Pharmaceuticals, Johnson & Johnson, Vertex Pharmaceuticals Incorporated, Virpax Pharmaceuticals, Gr?nenthal, and Oakwood Labs, among others

Market Dynamics

Drivers: Rising global surgical procedures are significantly driving the postoperative pain management market growth

The rapid rise in global surgical procedures is a major driver of the postoperative pain management market, as the surgeries create a vast and consistent need for effective analgesics. For instance, according to the National Institutes of Health (NIH), globally, over 310 million major surgeries are performed each year, with over 40 to 50 million in the USA and 20 million in Europe. It is estimated that 1–4% of these patients will die, up to 15% will have serious postoperative morbidity, and 5–15% will be readmitted within 30 days. With growing access to healthcare in emerging economies and an increasing number of elective and minimally invasive surgeries, the demand for advanced pain control solutions continues to escalate.

This trend has fueled the adoption of innovative, opioid-sparing products, such as the FDA-approved Pacira's EXPAREL (liposomal bupivacaine) for expanded use in adductor canal and sciatic nerve blocks, covering more than 3 million lower extremity orthopedic procedures annually, and also for shoulder nerve blocks to improve recovery outcomes. As hospitals and ambulatory surgical centers prioritize faster discharges and reduced opioid reliance, the surge in surgical volume not only increases the absolute market but also accelerates the shift toward long-acting local anesthetics, multimodal regimens, and novel drug-device combinations designed to improve both patient safety and cost-effectiveness.

Restraints: Safety concerns and adverse event profiles are hampering the growth of the market

Safety concerns and adverse event profiles remain a major barrier to the growth of the postoperative pain management market, as commonly used drug classes carry significant risks that limit their adoption and increase healthcare costs. Opioids, while effective, are associated with respiratory depression, sedation, delirium, and dependence, with opioid-related adverse events adding more cost in extra hospital costs and extending stays by over a day. NSAIDs pose risks of gastrointestinal

bleeding, renal impairment, and cardiovascular complications, which discourage their use in vulnerable post-surgical patients, while COX-2 inhibitors remain under scrutiny for cardiac safety.

Even local anesthetics, considered safer alternatives, can cause rare but severe systemic toxicities such as seizures or cardiovascular collapse when absorbed in excess or accidentally injected intravascularly. These risks trigger stricter regulatory demands, restricted label claims, and cautious prescribing behaviors among surgeons and anesthesiologists, especially in high-risk populations like pediatrics and geriatrics. Combined with negative public perception around opioid misuse and litigation against manufacturers, safety concerns not only suppress demand for certain analgesics but also slow the uptake of innovative formulations, ultimately hampering overall market expansion.

Postoperative Pain Management Market, Segment Analysis

The global postoperative pain management market is segmented based on drug type, route of administration, distribution channel, and region.

Drug Type: The opioids segment is dominating the postoperative pain management market with a 42.14% share in 2024

The opioids segment continues to dominate the postoperative pain management market due to their unmatched efficacy in controlling moderate to severe acute pain following surgery. Despite growing concerns about addiction and adverse events, opioids remain the first-line therapy in most hospital settings because of their rapid onset of action, broad availability, and cost-effectiveness compared to newer alternatives. Widely used agents such as morphine, hydromorphone, fentanyl, and oxycodone are routinely administered via intravenous, oral, or patient-controlled analgesia pumps, making them highly adaptable across surgical procedures.

Hospitals favor opioids because of familiarity, extensive clinical evidence, and inclusion in standard perioperative pain management guidelines, ensuring consistent demand. Furthermore, in regions with limited access to advanced non-opioid options, opioids dominate by default due to lower cost and broader reimbursement coverage. Although opioid-sparing protocols and products like liposomal bupivacaine and bupivacaine/meloxicam ER are gaining traction, they are mostly adjuncts rather than replacements. As a result, opioids maintain the largest share of the market, reflecting their entrenched role in surgical pain management despite the global push to curb

dependence.

The local anesthetics segment is the fastest-growing in the postoperative pain management market, with a 23.12% share in 2024

The local anesthetics segment is emerging as the fastest-growing area in the postoperative pain management market, driven by the need for safer, opioid-sparing alternatives and the availability of innovative long-acting formulations. Unlike opioids and NSAIDs, local anesthetics offer targeted pain relief with fewer systemic side effects, making them central to multimodal and ERAS (Enhanced Recovery After Surgery) protocols. A key growth driver is the approval of novel formulations such as Pacira's EXPAREL (liposomal bupivacaine), which provides up to 72 hours of analgesia and has recently been approved for adductor canal and sciatic nerve blocks in lower extremity surgeries, expanding its utility to over 3 million procedures annually.

Similarly, Heron Therapeutics' ZYNRELEF (extended-release bupivacaine + meloxicam), approved in 2021 and later expanded for joint arthroplasty and abdominal surgeries, has demonstrated the ability to significantly reduce pain and opioid requirements for up to 72 hours post-surgery. With growing adoption in outpatient and ambulatory surgical centers, where long-lasting localized pain relief enables early discharge and faster recovery, these products are setting new benchmarks. The rising clinical preference for prolonged pain control, alongside regulatory and payer support for opioid reduction, positions local anesthetics as the most dynamic growth engine within the postoperative pain management market.

Geographical Analysis

North America is expected to dominate the global postoperative pain management market with a 42.72% in 2024

North America stands as the dominant region in the global postoperative pain management market, accounting for the largest revenue share due to its high surgical volumes and rapid adoption of innovative FDA-approved therapies. The unique ecosystem of high surgical demand, regulatory agility, payer support, and innovation leadership solidifies North America's position as the most dominant region in the global postoperative pain management market.

US Postoperative Pain Management Market Trends

The US alone performs millions of elective and complex surgeries annually, including orthopedic joint replacements, cardiac interventions, and laparoscopic procedures, all of which demand effective postoperative pain control. The US strong regulatory environment further supports this dominance, as the FDA actively approves new and advanced analgesics such as Olinvyk (oliceridine) received approval in 2020 for intravenous use in hospitals and controlled clinical settings to treat moderate to severe acute pain, while Exparel (liposomal bupivacaine), approved for nerve blocks and surgical infiltration, continues to expand its indications, further strengthening regional market growth.

Similarly, in January 2024, Heron Therapeutics, Inc. announced that the U.S. Food and Drug Administration approved its supplemental New Drug Application for ZYNRELEF (bupivacaine and meloxicam) extended-release solution to expand the indication for soft tissue and orthopedic surgical procedures, including foot and ankle, and other procedures in which direct exposure to articular cartilage is avoided. ZYNRELEF was previously approved for foot and ankle, small-to-medium open abdominal, and lower extremity total joint arthroplasty surgical procedures in adults.

More recently, in January 2025, Vertex Pharmaceuticals Incorporated announced that the U.S. Food and Drug Administration (FDA) approved JOURNAVX (suzetrigine), an oral, non-opioid, highly selective NaV1.8 pain signal inhibitor for the treatment of adults with moderate-to-severe acute pain. JOURNAVX is an effective, well-tolerated medicine without evidence of addictive potential, indicated for use across all types of moderate-to-severe acute pain. Additionally, the presence of leading pharmaceutical companies, robust hospital networks, and a high level of clinician expertise ensures rapid diffusion of new products across both hospital and ambulatory surgical center settings.

The Asia Pacific region is the fastest-growing region in the global postoperative pain management market, with a CAGR of 5.7% in 2024

The Asia Pacific region is emerging as the fastest-growing market for postoperative pain management, fueled by rapid demographic shifts, expanding healthcare infrastructure, and rising surgical volumes across key countries such as China, India, Japan, and South Korea. This growth is strongly tied to the region's aging population, which is set to more than double from around 630 million in 2020 to over 1.3 billion by 2050, driving higher rates of orthopedic, cardiac, oncological, and gastrointestinal surgeries. The growing burden of chronic illnesses such as diabetes, obesity, and cancer is also contributing to higher surgical procedure counts, particularly for joint replacements, bariatric surgeries, and tumor resections, all of which require effective pain control.

Moreover, the Asia Pacific is witnessing a notable rise in minimally invasive and day-care surgeries, where patients demand longer-lasting pain relief to enable faster discharge and recovery, fueling the adoption of local anesthetics and non-opioid alternatives. While traditional opioids remain widely used due to their low cost and availability, there is increasing awareness of opioid-related adverse effects, pushing clinicians to incorporate multimodal analgesia and safer, long-acting formulations. Combined with evolving regulatory frameworks, growing patient expectations, and rising medical tourism in hubs like India, Thailand, and Singapore, the Asia Pacific region offers the strongest growth trajectory for the global postoperative pain management market, making it the focal point for both multinational players and regional manufacturers.

Europe Postoperative Pain Management Market Trends

The European postoperative pain management market is witnessing steady growth, driven by strong regulatory support and a shift toward safer, non-opioid pain management options. A key driver is the widespread adoption of multimodal analgesia and Enhanced Recovery After Surgery (ERAS) protocols, which emphasize non-opioid therapies to improve outcomes and reduce opioid-related side effects. Innovative FDA- and EMA-approved products are fueling this trend, such as Zynrelef (bupivacaine + meloxicam), which provides up to 72 hours of postoperative analgesia, and Maxigesic IV (paracetamol + ibuprofen), a non-addictive injectable alternative.

Countries like Germany are major contributors, reflecting strong adoption of advanced analgesics and hospital protocols. European regulatory standards, coupled with supportive reimbursement frameworks, facilitate the uptake of premium and safer pain management therapies. Combined with growing patient awareness and a focus on reducing opioid dependence, these factors position Europe as a key and steadily expanding market in the global postoperative pain management landscape.

Competitive Landscape

Top companies in the postoperative pain management market include Pacira Pharmaceuticals, Inc., Heron Therapeutics, Inc., Mallinckrodt Pharmaceuticals, Johnson & Johnson, Vertex Pharmaceuticals Incorporated, Virpax Pharmaceuticals, Grunenthal, and Oakwood Labs, among others.

The global postoperative pain management market report delivers a detailed analysis

with 56 key tables, more than 53 visually impactful figures, and 159 pages of expert insights, providing a complete view of the market landscape.

Contents

1. MARKET INTRODUCTION AND SCOPE

- 1.1. Objectives of the Report
- 1.2. Report Coverage & Definitions
- 1.3. Report Scope

2. EXECUTIVE INSIGHTS AND KEY TAKEAWAYS

- 2.1. Market Highlights and Strategic Takeaways
- 2.2. Key Trends and Future Projections
- 2.3. Snippet by Drug Type
- 2.4. Snippet by Route of Administration
- 2.5. Snippet by Distribution Channel
- 2.6. Snippet by Region

3. DYNAMICS

- 3.1. Impacting Factors
 - 3.1.1. Drivers
 - 3.1.1.1. Rising Global Surgical Procedures
 - 3.1.1.2. Innovation in Long-Acting Local Anesthetics
 - 3.1.2. Restraints
 - 3.1.2.1. Safety Concerns and Adverse Event Profiles
 - 3.1.2.2. High Cost of Novel Non-Opioid Formulations
 - 3.1.3. Opportunity
 - 3.1.3.1. Expansion of Multimodal Analgesia Pathways
 - 3.1.3.2. Development of Long-Acting and Targeted Local Anesthetics
 - 3.1.4. Impact Analysis

4. STRATEGIC INSIGHTS AND INDUSTRY OUTLOOK

- 4.1. Market Leaders and Pioneers
 - 4.1.1. Emerging Pioneers and Prominent Players
 - 4.1.2. Established Leaders with the Largest Marketing Brand
 - 4.1.3. Market Leaders with Established Products
- 4.2. Latest Developments and Breakthroughs
- 4.3. Regulatory and Reimbursement Landscape

- 4.3.1. North America
- 4.3.2. Europe
- 4.3.3. Asia Pacific
- 4.3.4. South America
- 4.3.5. Middle East & Africa
- 4.4. Porter's Five Forces Analysis
- 4.5. Patent Analysis
- 4.6. Unmet Needs and Gaps
- 4.7. Recommended Strategies for Market Entry and Expansion
- 4.8. Pricing Analysis and Price Dynamics

5. POSTOPERATIVE PAIN MANAGEMENT MARKET, BY DRUG TYPE

- 5.1. Introduction
 - 5.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Drug Type
 - 5.1.2. Market Attractiveness Index, By Drug Type
- 5.2. Opioids*
 - 5.2.1. Introduction
 - 5.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)
- 5.3. Non-Steroidal Anti-Inflammatory Drugs (NSAIDs)
- 5.4. Local Anesthetics
- 5.5. Cyclooxygenase-2 (COX-2) Inhibitors
- 5.6. Others

6. POSTOPERATIVE PAIN MANAGEMENT MARKET, BY ROUTE OF ADMINISTRATION

- 6.1. Introduction
 - 6.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Route of Administration
 - 6.1.2. Market Attractiveness Index, By Route of Administration
- 6.2. Oral*
 - 6.2.1. Introduction
 - 6.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)
- 6.3. Injectable
- 6.4. Topical
- 6.5. Others

7. POSTOPERATIVE PAIN MANAGEMENT MARKET, BY DISTRIBUTION CHANNEL

7.1. Introduction

7.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Distribution Channel

7.1.2. Market Attractiveness Index, By Distribution Channel

7.2. Hospital Pharmacies*

7.2.1. Introduction

7.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)

7.3. Retail Pharmacies

7.4. Online Pharmacies

8. POSTOPERATIVE PAIN MANAGEMENT MARKET, BY REGIONAL MARKET ANALYSIS AND GROWTH OPPORTUNITIES

8.1. Introduction

8.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Region

8.1.2. Market Attractiveness Index, By Region

8.2. North America

8.2.1. Introduction

8.2.2. Key Region-Specific Dynamics

8.2.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Drug Type

8.2.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Route of

Administration

8.2.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Distribution Channel

8.2.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country

8.2.6.1. U.S.

8.2.6.2. Canada

8.2.6.3. Mexico

8.3. Europe

8.3.1. Introduction

8.3.2. Key Region-Specific Dynamics

8.3.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Drug Type

8.3.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Route of

Administration

8.3.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Distribution Channel

8.3.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country

8.3.6.1. Germany

8.3.6.2. UK

8.3.6.3. France

8.3.6.4. Spain

8.3.6.5. Italy

8.3.6.6. Rest of Europe

8.4. Asia-Pacific

8.4.1. Introduction

8.4.2. Key Region-Specific Dynamics

8.4.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Drug Type

8.4.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Route of Administration

8.4.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Distribution Channel

8.4.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country

8.4.6.1. China

8.4.6.2. India

8.4.6.3. Japan

8.4.6.4. South Korea

8.4.6.5. Rest of Asia-Pacific

8.5. South America

8.5.1. Introduction

8.5.2. Key Region-Specific Dynamics

8.5.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Drug Type

8.5.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Route of Administration

8.5.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Distribution Channel

8.5.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country

8.5.6.1. Brazil

8.5.6.2. Argentina

8.5.6.3. Rest of South America

8.6. Middle East and Africa

8.6.1. Introduction

8.6.2. Key Region-Specific Dynamics

8.6.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Drug Type

8.6.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Route of Administration

8.6.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Distribution Channel

9. COMPETITIVE LANDSCAPE AND MARKET POSITIONING

9.1. Competitive Overview and Key Market Players

9.2. Market Share Analysis and Positioning Matrix

9.3. Strategic Partnerships, Mergers & Acquisitions

9.4. Key Developments in Product Portfolios and Innovations

9.5. Company Benchmarking

10. COMPANY PROFILES

10.1. Pacira Pharmaceuticals, Inc.*

10.1.1. Company Overview

10.1.2. Product Portfolio

10.1.2.1. Product Description

10.1.2.2. Product Key Performance Indicators (KPIs)

10.1.3. Financial Overview

10.1.3.1. Company Revenue

10.1.3.2. Geographical Revenue Shares

10.1.3.3. Revenue Forecasts

10.1.4. Key Developments

10.1.4.1. Mergers & Acquisitions

10.1.4.2. Key Product Development Activities

10.1.4.3. Regulatory Approvals, etc.

10.1.4.4. SWOT Analysis

10.2. Heron Therapeutics, Inc.

10.3. Mallinckrodt Pharmaceuticals

10.4. Johnson & Johnson

10.5. Vertex Pharmaceuticals Incorporated

10.6. Virpax Pharmaceuticals

10.7. Gr?nenthal

10.8. Oakwood Labs (LIST NOT EXHAUSTIVE)

11. ASSUMPTIONS AND RESEARCH METHODOLOGY

11.1. Data Collection Methods

11.2. Data Triangulation

11.3. Forecasting Techniques

11.4. Data Verification and Validation

12. APPENDIX

12.1. About Us and Services

12.2. Contact Us

List Of Tables

LIST OF TABLES

Table 1 Global Postoperative Pain Management Market Value, By Drug Type, 2025, 2029 & 2033 (US\$ Billion)

Table 2 Global Postoperative Pain Management Market Value, By Route of Administration, 2025, 2029 & 2033 (US\$ Billion)

Table 3 Global Postoperative Pain Management Market Value, By Distribution Channel, 2025, 2029 & 2033 (US\$ Billion)

Table 4 Global Postoperative Pain Management Market Value, By Region, 2025, 2029 & 2033 (US\$ Billion)

Table 5 Global Postoperative Pain Management Market Value, By Drug Type, 2025, 2029 & 2033 (US\$ Billion)

Table 6 Global Postoperative Pain Management Market Value, By Drug Type, 2022-2033 (US\$ Billion)

Table 7 Global Postoperative Pain Management Market Value, By Route of Administration, 2025, 2029 & 2033 (US\$ Billion)

Table 8 Global Postoperative Pain Management Market Value, By Route of Administration, 2022-2033 (US\$ Billion)

Table 9 Global Postoperative Pain Management Market Value, By Distribution Channel, 2025, 2029 & 2033 (US\$ Billion)

Table 10 Global Postoperative Pain Management Market Value, By Distribution Channel, 2022-2033 (US\$ Billion)

Table 11 Global Postoperative Pain Management Market Value, By Region, 2025, 2029 & 2033 (US\$ Billion)

Table 12 Global Postoperative Pain Management Market Value, By Region, 2022-2033 (US\$ Billion)

Table 13 North America Postoperative Pain Management Market Value, By Drug Type, 2022-2033 (US\$ Billion)

Table 14 North America Postoperative Pain Management Market Value, By Route of Administration, 2022-2033 (US\$ Billion)

Table 15 North America Postoperative Pain Management Market Value, By Distribution Channel, 2022-2033 (US\$ Billion)

Table 16 North America Postoperative Pain Management Market Value, By Country, 2022-2033 (US\$ Billion)

Table 17 Europe Postoperative Pain Management Market Value, By Drug Type, 2022-2033 (US\$ Billion)

Table 18 Europe Postoperative Pain Management Market Value, By Route of

Administration, 2022-2033 (US\$ Billion)

Table 19 Europe Postoperative Pain Management Market Value, By Distribution Channel, 2022-2033 (US\$ Billion)

Table 20 Europe Postoperative Pain Management Market Value, By Country, 2022-2033 (US\$ Billion)

Table 21 Asia-Pacific Postoperative Pain Management Market Value, By Drug Type, 2022-2033 (US\$ Billion)

Table 22 Asia-Pacific Postoperative Pain Management Market Value, By Route of Administration, 2022-2033 (US\$ Billion)

Table 23 Asia-Pacific Postoperative Pain Management Market Value, By Distribution Channel, 2022-2033 (US\$ Billion)

Table 24 Asia-Pacific Postoperative Pain Management Market Value, By Country, 2022-2033 (US\$ Billion)

Table 25 South America Postoperative Pain Management Market Value, By Drug Type, 2022-2033 (US\$ Billion)

Table 26 South America Postoperative Pain Management Market Value, By Route of Administration, 2022-2033 (US\$ Billion)

Table 27 South America Postoperative Pain Management Market Value, By Distribution Channel, 2022-2033 (US\$ Billion)

Table 28 South America Postoperative Pain Management Market Value, By Country, 2022-2033 (US\$ Billion)

Table 29 Middle East and Africa Postoperative Pain Management Market Value, By Drug Type, 2022-2033 (US\$ Billion)

Table 30 Middle East and Africa Postoperative Pain Management Market Value, By Route of Administration, 2022-2033 (US\$ Billion)

Table 31 Middle East and Africa Postoperative Pain Management Market Value, By Distribution Channel, 2022-2033 (US\$ Billion)

Table 32 Middle East and Africa Postoperative Pain Management Market Value, By Country, 2022-2033 (US\$ Billion)

Table 33 Pacira Pharmaceuticals, Inc.: Overview

Table 34 Pacira Pharmaceuticals, Inc.: Product Portfolio

Table 35 Pacira Pharmaceuticals, Inc.: Key Developments

Table 36 Heron Therapeutics, Inc.: Overview

Table 37 Heron Therapeutics, Inc.: Product Portfolio

Table 38 Heron Therapeutics, Inc.: Key Developments

Table 39 Mallinckrodt Pharmaceuticals: Overview

Table 40 Mallinckrodt Pharmaceuticals: Product Portfolio

Table 41 Mallinckrodt Pharmaceuticals: Key Developments

Table 42 Johnson & Johnson: Overview

- Table 43 Johnson & Johnson: Product Portfolio
- Table 44 Johnson & Johnson: Key Developments
- Table 45 Vertex Pharmaceuticals Incorporated: Overview
- Table 46 Vertex Pharmaceuticals Incorporated: Product Portfolio
- Table 47 Vertex Pharmaceuticals Incorporated: Key Developments
- Table 48 Virpax Pharmaceuticals: Overview
- Table 49 Virpax Pharmaceuticals: Product Portfolio
- Table 50 Virpax Pharmaceuticals: Key Developments
- Table 51 Gr?nenthal: Overview
- Table 52 Gr?nenthal: Product Portfolio
- Table 53 Gr?nenthal: Key Developments
- Table 54 Oakwood Labs: Overview
- Table 55 Oakwood Labs: Product Portfolio
- Table 56 Oakwood Labs: Key Developments

List Of Figures

LIST OF FIGURES

Figure 1 Global Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 2 Global Postoperative Pain Management Market Share, By Drug Type, 2024 & 2033 (%)

Figure 3 Global Postoperative Pain Management Market Share, By Route of Administration, 2024 & 2033 (%)

Figure 4 Global Postoperative Pain Management Market Share, By Distribution Channel, 2024 & 2033 (%)

Figure 5 Global Postoperative Pain Management Market Share, By Region, 2024 & 2033 (%)

Figure 6 Global Postoperative Pain Management Market Y-o-Y Growth, By Drug Type, 2023-2033 (%)

Figure 7 Opioids Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 8 Non-Steroidal Anti-Inflammatory Drugs (NSAIDs) Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 9 Local Anesthetics Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 10 Cyclooxygenase-2 (COX-2) Inhibitors Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 11 Others Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 12 Global Postoperative Pain Management Market Y-o-Y Growth, By Route of Administration, 2023-2033 (%)

Figure 13 Injectable Route of Administration in Global Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 14 Oral Route of Administration in Global Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 15 Topical Route of Administration in Global Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 16 Others Route of Administration in Global Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 17 Global Postoperative Pain Management Market Y-o-Y Growth, By Distribution Channel, 2023-2033 (%)

Figure 18 Hospital Pharmacies Distribution Channel in Global Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 19 Retail Pharmacies Distribution Channel in Global Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 20 Online Pharmacies Distribution Channel in Global Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 21 Global Postoperative Pain Management Market Y-o-Y Growth, By Region, 2023-2033 (%)

Figure 22 North America Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 23 North America Postoperative Pain Management Market Share, By Drug Type, 2024 & 2033 (%)

Figure 24 North America Postoperative Pain Management Market Share, By Route of Administration, 2024 & 2033 (%)

Figure 25 North America Postoperative Pain Management Market Share, By Distribution Channel, 2024 & 2033 (%)

Figure 26 North America Postoperative Pain Management Market Share, By Country, 2024 & 2033 (%)

Figure 27 Europe Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 28 Europe Postoperative Pain Management Market Share, By Drug Type, 2024 & 2033 (%)

Figure 29 Europe Postoperative Pain Management Market Share, By Route of Administration, 2024 & 2033 (%)

Figure 30 Europe Postoperative Pain Management Market Share, By Distribution Channel, 2024 & 2033 (%)

Figure 31 Europe Postoperative Pain Management Market Share, By Country, 2024 & 2033 (%)

Figure 32 Asia-Pacific Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 33 Asia-Pacific Postoperative Pain Management Market Share, By Drug Type, 2024 & 2033 (%)

Figure 34 Asia-Pacific Postoperative Pain Management Market Share, By Route of Administration, 2024 & 2033 (%)

Figure 35 Asia-Pacific Postoperative Pain Management Market Share, By Distribution Channel, 2024 & 2033 (%)

Figure 36 Asia-Pacific Postoperative Pain Management Market Share, By Country, 2024 & 2033 (%)

Figure 37 South America Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 38 South America Postoperative Pain Management Market Share, By Drug

Type, 2024 & 2033 (%)

Figure 39 South America Postoperative Pain Management Market Share, By Route of Administration, 2024 & 2033 (%)

Figure 40 South America Postoperative Pain Management Market Share, By Distribution Channel, 2024 & 2033 (%)

Figure 41 South America Postoperative Pain Management Market Share, By Country, 2024 & 2033 (%)

Figure 42 Middle East and Africa Postoperative Pain Management Market Value, 2022-2033 (US\$ Billion)

Figure 43 Middle East and Africa Postoperative Pain Management Market Share, By Drug Type, 2024 & 2033 (%)

Figure 44 Middle East and Africa Postoperative Pain Management Market Share, By Route of Administration, 2024 & 2033 (%)

Figure 45 Middle East and Africa Postoperative Pain Management Market Share, By Distribution Channel, 2024 & 2033 (%)

Figure 46 Pacira Pharmaceuticals, Inc.: Financials

Figure 47 Heron Therapeutics, Inc.: Financials

Figure 48 Mallinckrodt Pharmaceuticals: Financials

Figure 49 Johnson & Johnson: Financials

Figure 50 Vertex Pharmaceuticals Incorporated: Financials

Figure 51 Virpax Pharmaceuticals: Financials

Figure 52 Gr?nenthal: Financials

Figure 53 Oakwood Labs: Financials

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