

# **Companion Animal Postoperative Pain Management Therapeutics Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028**

## **Segmented By Product (NSAIDs, Anesthetics, Opioids, Others), By Animal Type (Canine, Feline), By Region, and By Competition**

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### **Abstracts**

Global Companion Animal Postoperative Pain Management Therapeutics Market has valued at USD 340.55 million in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 7.00% through 2028. The surge in pet surgical interventions, particularly in the areas of orthopedics and dentistry, is driving up the need for post-surgery pain management medications. The growing incidence of periodontal diseases is projected to boost the requirement for dental surgeries. As per the findings in the AMA report, the number of canine clinic visits saw a 6% increase between 2014 and 2017, primarily attributed to the upswing in dental issues during that period. The increasing ownership of companion animals is also expected to contribute to the overall revenue expansion in this sector.

#### **Key Market Drivers**

##### **Increasing Pet Ownership**

Pet ownership is a cherished and growing aspect of modern life. As more people open their homes and hearts to companion animals, the pet industry is experiencing unprecedented growth. While this trend has numerous positive implications for the well-being of our furry friends, it is also serving as a significant catalyst for the expansion of the global companion animal postoperative pain management therapeutics market.

The bond between pet owners and their animals is unlike any other. The strong emotional connection drives owners to provide the best possible care for their pets. This sense of responsibility extends to postoperative care as well. When a pet undergoes surgery, be it for orthopedic, dental, or any other medical reason, owners are keen to ensure their pets recover as comfortably and pain-free as possible. This emotional attachment motivates them to seek effective postoperative pain management solutions.

According to the American Pet Products Association (APPA), the number of pet-owning households in the United States alone increased from 67 million in 1988 to over 85 million in 2017. This surge in pet ownership is not limited to the U.S.; it's a global phenomenon. The statistics show that more and more people are inviting pets into their lives. With this growth in pet populations, the demand for pet healthcare and, by extension, postoperative pain management therapeutics, has also increased significantly.

As the number of pet owners rises, so does the demand for specialized veterinary services. Pet parents seek top-notch healthcare for their animals, including access to specialized surgical procedures and advanced postoperative care. This increase in demand for high-quality veterinary care drives the need for efficient pain management solutions to ensure pets recover with minimal discomfort.

Different animals and different types of surgeries require a tailored approach to postoperative pain management. With increasing pet ownership, the diversity of needs within the companion animal postoperative pain management therapeutics market is expanding. Veterinary pharmaceutical companies are continually innovating to develop a wide range of products to meet these diverse needs, leading to an array of options for veterinarians and pet owners.

The surge in pet ownership has catalyzed research and development in the field of companion animal pain management. New and improved pain relief medications, techniques, and therapies are being introduced, offering more effective and humane solutions for managing postoperative pain. Pet owners are more willing than ever to invest in these advanced solutions to ensure the well-being and comfort of their animals during the recovery process.

The increase in pet ownership has ushered in a more holistic approach to pet healthcare. Owners are increasingly conscious of their pets' overall well-being, which includes not only preoperative and surgical care but also the postoperative phase. This

holistic perspective encourages pet owners to explore a wide range of postoperative pain management options, further boosting the demand for related therapeutics.

### Surge in Orthopedic and Dental Surgeries

In the realm of companion animal healthcare, there is a remarkable surge in the number of orthopedic and dental surgeries being performed. This growing trend has significant implications, not only for the well-being of our beloved pets but also for the expansion of the global companion animal postoperative pain management therapeutics market.

As pet ownership becomes more widespread and the bond between humans and their furry companions deepens, there is a heightened awareness of the need for comprehensive healthcare. Orthopedic and dental surgeries are often required to address critical issues in companion animals. Pet owners, driven by their love and concern for their pets, are increasingly opting for these procedures. Consequently, the demand for postoperative pain management therapeutics has surged as owners want to ensure that their pets recover comfortably and with minimal pain.

Orthopedic surgeries, such as those aimed at addressing cruciate ligament injuries, hip dysplasia, and fractures, are essential for improving the mobility and quality of life of companion animals. These procedures, however, often result in postoperative pain that requires effective management. The growth in orthopedic surgeries is accompanied by a parallel need for advanced postoperative pain management solutions. This demand fuels the development of innovative therapeutics tailored to the unique needs of orthopedic surgery patients.

Periodontal diseases are among the most common health issues in companion animals, particularly dogs and cats. Left untreated, these conditions can cause pain, discomfort, and lead to more severe health problems. As awareness of periodontal diseases increases, so does the demand for dental surgeries to address them. Dental surgeries, which often involve tooth extractions and other procedures, require careful postoperative pain management to ensure the comfort and well-being of the animal during recovery.

The field of veterinary medicine has witnessed significant advancements, paralleling those in human medicine. These advancements include improved surgical techniques, more precise anesthesia, and advanced pain management options. Veterinarians now have access to a wider range of therapeutic solutions to cater to the specific needs of companion animals. The increasing availability of these advanced pain management

options contributes to the growth of the market.

## Rising Awareness of Pet Health

In the evolving landscape of pet care, an undeniable shift is occurring in the way people perceive and address the health of their beloved companion animals. With a heightened awareness of pet health, a myriad of advancements in veterinary medicine and an unwavering commitment to the well-being of furry friends, we are witnessing a significant boost in the global companion animal postoperative pain management therapeutics market.

The relationship between pet owners and their animals transcends the bounds of mere ownership. It's an emotional bond that many describe as family. This bond fosters a profound sense of responsibility and care for the well-being of companion animals. With this emotional connection, pet owners are increasingly driven to ensure their pets receive the best possible healthcare, especially in the context of surgeries and postoperative care. Post-surgery pain management therapeutics are a crucial part of this equation, and the awareness of their necessity is on the rise.

Pet ownership is on the rise globally. According to the American Pet Products Association (APPA), the number of pet-owning households in the United States increased from 67 million in 1988 to over 85 million in 2017. This trend is not exclusive to the U.S. but extends to many countries around the world. With more people embracing the joys and responsibilities of pet ownership, there is a parallel increase in demand for advanced healthcare solutions, including postoperative pain management therapeutics.

Modern pet owners increasingly adopt a holistic approach to their pets' health. They view their animals as individuals with unique needs, and this perspective influences their choices regarding surgical procedures and postoperative care. A comprehensive approach to pet health extends to the effective management of pain and discomfort following surgeries. This shift in mindset is pushing the boundaries of the companion animal postoperative pain management therapeutics market, encouraging the development of advanced and tailored solutions.

As the awareness of pet health grows, so does the need for specialized veterinary care. Pet parents are seeking out experts in the field who can provide top-notch healthcare services, which include the latest surgical techniques and postoperative pain management options. This demand for high-quality veterinary care is a key driver for the

development and utilization of innovative therapeutic solutions to ensure the comfort and well-being of companion animals.

The increasing awareness of pet health has led to more in-depth research into the field. This research is instrumental in uncovering the unique needs of different companion animals and tailoring postoperative pain management therapeutics to meet these needs effectively. Pharmaceutical companies and veterinary professionals are investing in innovative solutions to offer the best possible care, further driving the growth of this market.

### Veterinary Advancements

In recent years, veterinary medicine has made tremendous strides in enhancing the quality of care provided to our beloved companion animals. These advancements are not only improving the health and well-being of pets but are also significantly boosting the growth of the global companion animal postoperative pain management therapeutics market.

One of the most crucial aspects of postoperative pain management is the surgical procedure itself. In recent years, veterinary surgery has evolved dramatically. Veterinarians now employ more precise and less invasive techniques, reducing trauma and pain during surgery. The advancement in surgical techniques not only benefits the animals by minimizing postoperative pain but also enhances the efficacy of pain management therapeutics during the recovery period.

Advancements in veterinary anesthesia have made surgery safer and less painful for companion animals. Modern anesthesia protocols are designed to ensure smooth transitions between unconsciousness and consciousness, resulting in a more comfortable and pain-free recovery. This improved anesthesia plays a pivotal role in the success of postoperative pain management, allowing for more targeted and effective therapeutics.

Veterinarians now have access to a wider range of pain management solutions, enabling them to tailor postoperative care plans to the specific needs of individual animals. This personalization is made possible by veterinary advancements, allowing for a better understanding of the diverse factors that can influence pain management, including the animal's age, breed, and the type of surgery performed. Customized pain management plans lead to more effective and compassionate care for companion animals.

As veterinary medicine progresses, so does the field of pharmaceuticals designed to alleviate postoperative pain in companion animals. Pharmaceutical companies are actively engaged in research and development, striving to create therapeutics that are not only more effective but also have fewer side effects. This innovation has led to a broader range of pain management options for veterinarians and pet owners, ensuring that animals recover comfortably and with minimal pain.

Technological advancements have transformed the way companion animals are monitored during surgery and postoperative care. The availability of advanced monitoring tools allows veterinarians to keep a closer eye on vital signs and adjust pain management protocols in real-time as needed. This precise monitoring contributes to the overall well-being of the animal and plays a crucial role in ensuring the effectiveness of postoperative pain management therapeutics.

## Key Market Challenges

### Cost of Research and Development

Developing new pain management therapeutics for companion animals requires significant investment in research and development. The cost of conducting clinical trials, ensuring safety and efficacy, and meeting regulatory requirements can be substantial. This financial burden can discourage companies from entering the market, limiting the availability of new and improved therapeutics.

### Resistance to Pain Medications

Companion animals, like humans, can develop resistance to pain medications over time. This can complicate postoperative pain management, as higher doses or different medications may be required to achieve the same level of pain relief. Finding effective solutions for animals that have developed tolerance to pain medications is an ongoing challenge in the industry.

### Limited Availability of Pain Assessment Tools

Assessing pain in animals can be challenging due to their inability to communicate discomfort in the same way humans do. Although there are various tools and scales to evaluate pain in companion animals, their adoption and consistent use can be limited. This can hinder the accurate measurement and management of postoperative pain.



## Key Market Trends

### Advanced Pharmaceutical Innovations

The pharmaceutical industry is actively engaged in research and development to create more innovative pain management therapeutics for companion animals. These innovations encompass a broader range of medication options with fewer side effects, ensuring that pets can recover with minimal pain and discomfort. Expect to see new and improved medications that cater to the specific needs of different animals.

### Adoption of Alternative Therapies

While pharmaceuticals play a crucial role in postoperative pain management, there is a growing trend toward the adoption of alternative and complementary therapies. Techniques like acupuncture, physical therapy, and natural remedies are gaining popularity as pet owners seek holistic approaches to pain relief for their animals. The integration of these alternative therapies with conventional pharmaceuticals is a trend that offers comprehensive pain management solutions.

### Ethical and Environmental Considerations

With increasing awareness of the environmental impact of pharmaceuticals, there is a trend towards more ethical and sustainable practices in the industry. This includes the development of medications that have a reduced environmental footprint and adherence to stricter ethical guidelines in research and manufacturing. This trend reflects the growing awareness of both pet health and broader sustainability concerns.

## Segmental Insights

### Product Insights

Based on the category of Product, the NSAIDs category asserted its dominance in the market in 2022, primarily due to the widespread availability of these products. These medications are primarily employed to manage inflammation and post-surgery pain. NSAIDs offer a cost-effective alternative compared to opioids and anesthetics, which is consequently boosting their revenue. Prominent examples of frequently used NSAIDs for post-surgical pain include Rimadyl (Injectable), Metacam, Deramaxx, and Previcox. Market participants are actively pursuing the development of innovative NSAIDs tailored

for peri-operative pain management. Notably, Elanco secured approval for Onsior in May 2016, specifically designed for postoperative pain management following soft tissue surgery in dogs.

The anesthetics segment is anticipated to exhibit consistent growth throughout the projected period. Lidocaine and bupivacaine are commonly utilized anesthetics. According to a report from the AVMA, around 5 million dogs experienced post-surgical pain in 2016. The demand for controlled-release or long-acting local anesthetics is on the rise, as pet owners increasingly prefer to bring their pets home after surgical procedures. In 2016, Aratana Therapeutics introduced Nocita, designed for postoperative pain management, with the capability to effectively alleviate pain for up to 72 hours.

### Animal Type Insights

In 2022, the Canine sector secured the largest market share, primarily due to a notable increase in surgical procedures. The growing prevalence of chronic ailments in dogs serves as a key driver for this trend. Surgeries such as dental procedures, hip dysplasia treatments, cataract operations, wound repairs, and neutering are among the most frequently performed procedures on dogs, all necessitating postoperative care. Furthermore, the rising adoption of dogs as companion animals in households across both developed and developing nations is expected to further stimulate market growth.

On the other hand, the Feline segment is poised for a consistent CAGR during the forecast period. This steady growth is attributable to a growing concern among cat owners regarding the management of postoperative pain in their feline companions. Additionally, the increase in surgical interventions performed on cats plays a significant role in propelling this segment's growth. Common health issues in cats include urinary tract infections, bladder stones, kidney diseases, dental and ocular problems, and ear infections. The surge in cat adoption in European and Asian countries is contributing to this expansion. Notably, in 2018, Europe boasted a feline population of 102.69 million, surpassing the canine population of 84.91 million. The availability of favorable insurance policies is also projected to further augment growth within this segment.

### Regional Insights

In 2022, North America took the lead in terms of revenue, securing the largest market share. This was attributed to the region's increasing government initiatives and a well-structured healthcare system, both of which are anticipated to be driving factors for



growth. The surge in pet ownership, coupled with a growing demand for effective animal care, is expected to create revenue-generating opportunities within North America. The rising incidence of chronic illnesses in pets is also projected to stimulate the demand for therapeutics related to postoperative pain management in companion animals.

Additionally, the escalating number of veterinary surgeries, particularly orthopedic and dental procedures, is further contributing to market growth. According to the American Pet Products Association (APPA) report, Americans spent approximately USD 18.11 billion on veterinary care in 2018. Moreover, the presence of major industry players like Zoetis, Elanco, and Merck is bolstering regional growth.

Furthermore, the increasing demand for pet insurance is leading to the availability of enhanced treatment options for companion animals. According to a report from the North American Pet Health Insurance Association (NAPHIA), over 2 million pets were insured in the United States and Canada in 2017, reflecting an average increase of nearly 17% from the previous year.

In contrast, the Asia Pacific region is expected to exhibit a lucrative AGR during the forecasted period. The rising prevalence of various chronic diseases has led to an upsurge in companion animal surgeries. The growing trend of pet ownership, particularly in countries like Japan and China, is anticipated to further drive the market. For instance, according to the National Bureau of Statistics of China, the country ranked third in the world for dog ownership in 2017, with 27.4 million pet dogs, following the U.S. (55.3 million) and Brazil (35.7 million). The high demand for insurance policies is also fueling revenue generation in the region, as reported in the Pet Industry White Paper 2018, where pet owners in Japan spend around USD 740 per pet.

## Key Market Players

Zoetis Inc

Bayer AG

Merck Animal Health

Elanco Animal Health Inc

Norbrook Laboratories Ltd

Ceva Sante Animale SA

Dechra Pharmaceuticals PLC

Report Scope:

In this report, the Global Companion Animal Postoperative Pain Management Therapeutics Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Companion Animal Postoperative Pain Management Therapeutics Market, By Product:

NSAIDs

Anesthetics

Opioids, Others

Companion Animal Postoperative Pain Management Therapeutics Market, By Animal Type:

Canine

Feline

Companion Animal Postoperative Pain Management Therapeutics Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Companion Animal Postoperative Pain Management Therapeutics Market.

## Available Customizations:

Global Companion Animal Postoperative Pain Management Therapeutics market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

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