

Companion Animal Postoperative Pain Management Therapeutics Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Animal (Dogs, Cats, Horses, Others), By Product (NSAIDs, Anesthetics, Opioids, Others), By Route of Administration (Oral, Injectable), By Region and Competition, 2020-2030F

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Abstracts

Global Companion Animal Postoperative Pain Management Therapeutics Market was valued at USD 196.21 Million in 2024 and is expected to reach USD 327.53 Million in the forecast period with a CAGR of 8.89% through 2030. The Global Companion Animal Postoperative Pain Management Therapeutics Market is experiencing significant growth due to the increasing focus on pet welfare and the growing awareness of the importance of pain management in animals' post-surgery. Pet owners are becoming more attuned to the need for specialized care during the recovery process, which has led to a rising demand for effective postoperative pain management therapies. The availability of advanced therapeutic options such as nonsteroidal anti-inflammatory drugs (NSAIDs) and long-acting analgesics is contributing to this growth. As veterinarians continue to prioritize pain-free recovery for companion animals, the market is expanding with innovative pain relief solutions designed to enhance healing and improve the overall quality of life for pets.

Key drivers of the market include rising pet ownership and the increasing demand for high-quality veterinary care. As companion animals are increasingly considered family members, pet owners are seeking professional healthcare solutions that ensure their pets' comfort and well-being during recovery. Furthermore, as the incidence of surgeries in pets increases, so does the need for effective pain management solutions. Pet

owners' growing awareness of the available therapeutic options and their willingness to invest in post-surgery pain relief are also key contributors to the market's expansion. The rising number of veterinary clinics and professionals offering specialized care has further increased the accessibility of these treatments, fostering market growth.

Despite the strong growth, the market faces certain challenges, particularly around the limited education and awareness among pet owners and healthcare professionals in emerging markets. The lack of awareness about advanced postoperative pain management solutions in these regions, combined with the high cost of certain therapies, restricts market accessibility. Additionally, challenges related to the development of tailored treatments for different animal species and the variability in their pain responses continue to pose obstacles to market growth. However, with continued innovation in drug formulations, improved education initiatives, and a growing focus on animal welfare, the Global Companion Animal Postoperative Pain Management Therapeutics Market is expected to thrive.

Key Market Drivers

Increasing Pet Ownership and Humanization of Pets

The increasing pet ownership and humanization of pets have significantly influenced the Global Companion Animal Postoperative Pain Management Therapeutics Market. As pets are now often regarded as family members, pet owners have become more attentive to their pets' well-being, resulting in an increased demand for specialized healthcare services, including postoperative pain management therapies. This has been particularly notable in developed markets such as the United States, where pet ownership has reached a new high, with 86.9 million households owning pets as of 2023, representing 66% of U.S. households, up from 62% in 2022.

The rising number of pets has led to an increase in veterinary procedures, including surgeries, which in turn drives the demand for effective pain management solutions. In 2023, U.S. pet owners spent USD 136.8 billion on pet-related expenses, with a substantial portion allocated to veterinary care, which includes both routine treatments and surgical interventions that require postoperative pain management. With pet owners increasingly viewing pets as family, there is greater willingness to invest in advanced pain management therapies, contributing significantly to market growth.

The humanization of pets has also led to a shift in consumer behavior, where owners

seek high-quality, often natural, products and services that enhance their pets' comfort and recovery. As pet owners become more aware of the potential risks of inadequate pain management, there is an increased demand for therapies that not only alleviate pain but also promote overall well-being. This growing demand for specialized postoperative care therapies is expected to continue driving the growth of the companion animal postoperative pain management therapeutics market. Additionally, this trend is encouraging companies to invest in developing innovative and safe pain management solutions tailored to the needs of pets, including oral formulations, topical treatments, and injectable medications.

Technological Advancements in Pain Management

Technological advancements in veterinary pain management have significantly enhanced postoperative care for companion animals. Innovations such as laser therapy, which utilizes focused light to stimulate tissue repair and reduce pain, have become integral in treating musculoskeletal injuries and promoting healing. This non-invasive approach offers a drug-free alternative, facilitating faster recovery and improving the quality of life for pets.

The integration of artificial intelligence (AI) and machine learning into veterinary practices has further transformed pain management strategies. AI-powered tools assist in early disease detection, personalized treatment plans, and predictive analytics, enabling veterinarians to make more informed decisions regarding postoperative pain management. For instance, AI algorithms analyze medical data to predict pain levels and recommend appropriate interventions, leading to more effective and tailored pain relief solutions.

Advancements in drug delivery systems, such as transdermal patches and implantable devices, have improved the administration of pain relief medications. These technologies ensure consistent dosing, reduce the frequency of administration, and enhance patient compliance, all of which contribute to more effective postoperative pain management. The development of long-acting formulations has also minimized the need for frequent dosing, providing sustained pain relief and improving recovery outcomes for companion animals.

Collectively, these technological innovations are revolutionizing postoperative pain management in veterinary medicine, leading to more effective, personalized, and humane care for companion animals.

Increased Surgical Procedures in Companion Animals

The increasing number of surgical procedures performed on companion animals is a significant driver of the Global Companion Animal Postoperative Pain Management Therapeutics Market. As pet ownership rises globally, so does the incidence of surgeries, including routine procedures like spaying and neutering, as well as more complex surgeries such as orthopedic and soft tissue operations. For instance, the American Pet Products Association (APPA) reports that pet ownership in the U.S. has reached 85 million, with millions of pets undergoing surgeries annually.

This surge in surgical interventions necessitates effective postoperative pain management to ensure optimal recovery and enhance the quality of life for pets. The growing awareness among pet owners about the importance of managing postoperative pain has led to an increased demand for specialized therapeutics. Veterinarians are increasingly adopting multimodal analgesic protocols, combining various classes of drugs to achieve superior pain relief and minimize side effects. This approach not only addresses immediate pain but also contributes to faster healing and reduces the risk of chronic pain development.

The market is also witnessing advancements in drug formulations, such as the development of long-acting injectable pain relievers and transdermal patches, which offer sustained pain relief and improve compliance. These innovations are particularly beneficial in managing postoperative pain, as they reduce the frequency of dosing and ensure consistent therapeutic levels. The combination of increased surgical procedures and the demand for effective pain management solutions is propelling the growth of the companion animal postoperative pain management therapeutics market.

Key Market Challenges

High Cost of Pain Management Therapies

The high cost of postoperative pain management therapies presents a significant challenge in the Global Companion Animal Postoperative Pain Management Therapeutics Market. Advanced pain management treatments, such as extended-release formulations, opioid-based solutions, and sophisticated drug delivery systems, often come with substantial price tags. This financial burden can limit accessibility for many pet owners, particularly in developing regions where economic constraints are more pronounced. The expense associated with these therapies may lead to underutilization, resulting in inadequate pain relief for companion animals during their

recovery periods.

To address this issue, there is a growing emphasis on developing cost-effective pain management solutions that do not compromise efficacy. Innovations in drug formulation and delivery methods aim to reduce production costs, making these therapies more affordable for a broader range of pet owners. Additionally, increasing awareness among pet owners about the importance of postoperative pain management is encouraging investment in these therapies, potentially leading to economies of scale and reduced costs over time.

For instance, the American Animal Hospital Association (AAHA) emphasizes the importance of multimodal analgesia, which involves using multiple methods to manage pain, thereby potentially reducing the need for more expensive single-agent therapies. This approach not only enhances pain relief but also may help in managing costs associated with postoperative care.

Concerns Over Opioid Use and Abuse

The concern over opioid use and abuse is one of the significant challenges in the Global Companion Animal Postoperative Pain Management Therapeutics Market. Opioids, while effective in managing acute pain, have been increasingly scrutinized due to their potential for misuse, dependence, and overdose, both in humans and animals. In companion animals, particularly dogs and cats, opioids like morphine and tramadol are commonly prescribed for postoperative pain. However, these drugs carry risks of sedation, gastrointestinal issues, and in rare cases, overdose, especially if not administered correctly.

One of the primary challenges is the lack of standardized guidelines on opioid prescriptions for animals, leading to inconsistent usage practices. Veterinary professionals must carefully balance the need for pain relief with the risks of opioid side effects, which can complicate recovery. Inappropriate prescribing or misuse by pet owners can exacerbate the issue. Moreover, opioid residues in animal tissues can pose risks if the animal is later used for food production, leading to stricter regulations and additional concerns for veterinarians prescribing these medications.

The increasing awareness of the opioid crisis in human healthcare is also influencing the veterinary sector, with growing pressure to limit opioid use in animals. Regulatory agencies are tightening rules around the use of opioids in veterinary medicine, and pet owners are becoming more cautious about using these drugs for their pets. This is

driving the demand for alternative pain management solutions, such as NSAIDs, local anesthetics, and multimodal therapies. While these alternatives provide effective pain relief, they do not always offer the same level of potency as opioids, creating challenges in managing severe postoperative pain.

Key Market Trends

Integration of Multimodal Pain Management Approaches

The integration of multimodal pain management approaches is emerging as a significant trend in the Global Companion Animal Postoperative Pain Management Therapeutics Market. Multimodal pain management involves combining various therapeutic strategies to address different pain pathways, ensuring more comprehensive and effective pain relief. This approach is especially beneficial for postoperative care in companion animals, where a single modality may not be sufficient to manage the complex nature of surgical pain. By using a combination of drugs such as NSAIDs, opioids, local anesthetics, and adjunct therapies, veterinarians can target multiple aspects of pain, including inflammation, nerve transmission, and tissue damage.

One key benefit of multimodal pain management is its ability to reduce the reliance on opioids, which are often associated with adverse side effects, such as sedation, gastrointestinal issues, and potential for misuse. By incorporating non-opioid therapies, such as NSAIDs and regional anesthesia, the risk of opioid-related complications can be minimized while maintaining effective pain control. This not only improves the safety and comfort of pets but also addresses growing concerns about opioid misuse in veterinary medicine.

In addition, multimodal approaches allow for more personalized pain management plans tailored to the individual needs of each animal. Factors such as breed, size, age, and the type of surgery performed influence the selection of therapies, making this approach highly adaptable. As veterinary practices continue to adopt evidence-based, personalized care models, the demand for multimodal pain management strategies is expected to rise. This trend is reshaping postoperative pain management, driving the development of innovative drug combinations and delivery methods to improve the overall welfare of companion animals.

Shift Towards Non-Opioid Pain Management Solutions

The shift toward non-opioid pain management solutions is a significant trend in the Global Companion Animal Postoperative Pain Management Therapeutics Market. Growing concerns about the risks associated with opioid use, including potential misuse, addiction, and adverse side effects, have led to an increased demand for alternative pain management options. Opioids, such as morphine and hydromorphone, have traditionally been used for managing severe postoperative pain in companion animals, but their potential for abuse and side effects have prompted veterinarians to explore safer and more sustainable options.

Non-steroidal anti-inflammatory drugs (NSAIDs), local anesthetics, and other non-opioid medications are gaining popularity due to their efficacy and lower risk profiles. NSAIDs, which reduce inflammation and alleviate pain, are widely used for managing postoperative pain in companion animals, especially after routine surgeries such as spaying and neutering. These drugs are preferred as they provide effective pain relief without the risk of opioid dependence or overdose.

The growing trend towards multimodal pain management, which combines various therapies to target different pain pathways, has also fueled the shift towards non-opioid solutions. For example, combining NSAIDs with local anesthetics or nerve blocks provides more comprehensive pain relief while minimizing the reliance on opioids. As veterinarians become more aware of the risks associated with opioids and the availability of safer alternatives, the demand for non-opioid pain management options is expected to continue growing, aligning with broader efforts to reduce opioid use across human and animal healthcare settings. This trend reflects a growing commitment to ensuring the safety and well-being of companion animals during their recovery periods.

Segmental Insights

Animal Insights

Based on the Animal, Dogs emerged as the dominant segment in the Global Companion Animal Postoperative Pain Management Therapeutics Market in 2024. This is due to their significant representation in global pet ownership and the rising focus on canine healthcare. As one of the most adopted companion animals, dogs often require various surgical interventions, such as spaying, neutering, dental procedures, and orthopedic surgeries, which necessitate effective postoperative pain management solutions. The growing availability of specialized veterinary care, coupled with advancements in canine-specific analgesics and pain management protocols, has contributed to the segment's dominance. Many dog owners are increasingly willing to

invest in premium pain management solutions that ensure the safety and well-being of their pets. Additionally, research efforts have intensified in recent years to develop innovative therapies, such as long acting injectables and transdermal patches, designed specifically for canine use. These factors, combined with a steady increase in the global dog population, have solidified the position of dogs as the leading segment in the market, driving sustained growth in therapeutic options for postoperative pain management.

Route of Administration Insights

Based on the Route of Administration, Oral emerged as the dominant segment in the Global Companion Animal Postoperative Pain Management Therapeutics Market in 2024. This dominance is driven by its convenience, efficacy, and widespread acceptance among pet owners and veterinarians. Oral formulations, such as tablets, capsules, and liquid solutions, are easier to administer compared to injectable or transdermal alternatives, reducing stress for both animals and their caregivers. This user-friendly method ensures better compliance with prescribed pain management regimens, particularly in outpatient settings where pet owners play a key role in postoperative care. The development of palatable formulations tailored for companion animals has further boosted the popularity of oral administration. Flavored tablets and liquids are designed to appeal to pets, making the process of medication more manageable and improving adherence to treatment protocols. The segment has also benefited from advancements in pharmaceutical technology, enabling the creation of extended-release oral formulations that provide sustained pain relief, minimizing the need for frequent dosing.

Regional Insights

North America emerged as the dominant region in the Global Companion Animal Postoperative Pain Management Therapeutics Market in 2024. This is primarily driven by a combination of advanced veterinary healthcare infrastructure, high pet ownership rates, and growing awareness of postoperative care for companion animals. The region is home to a significant number of veterinary clinics, animal hospitals, and research facilities, ensuring access to advanced pain management solutions for pets undergoing surgical procedures. The widespread availability of skilled veterinary professionals further supports the adoption of specialized therapeutics for postoperative pain.

The high level of pet ownership in North America, particularly in the United States and Canada, has created a robust demand for advanced healthcare solutions for companion

animals. Pet owners in the region are increasingly prioritizing the well-being and recovery of their animals, driving investments in premium postoperative pain management products. In addition, the strong presence of key market players and ongoing research initiatives in veterinary medicine contribute to the development and commercialization of innovative therapeutics, such as long-acting injectables and transdermal patches. Government regulations promoting animal welfare, coupled with the rising trend of humanizing pets, have also fueled the adoption of effective pain management solutions. These factors collectively position North America as a leading market for companion animal postoperative pain therapeutics.

Key Market Players

Zoetis Inc.

Merck & Co., Inc.

Elanco Animal Health Inc.

Ceva Santé Animale S.A.

Boehringer Ingelheim International GmbH

Norbrook Laboratories

Dechra Pharmaceuticals PLC

Chanelle Pharma

Bimeda Holdings Limited

VETOQUINOL S.A.

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
Animal:

Dogs

Cats

Horses

Others

Companion Animal Postoperative Pain Management Therapeutics Market, By
Product:

NSAIDs

Anesthetics

Opioids

Others

Companion Animal Postoperative Pain Management Therapeutics Market, By
Route of Administration:

Oral

Injectable

Companion Animal Postoperative Pain Management Therapeutics Market, By
Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

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, TechSci 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, and Trends

4. VOICE OF CUSTOMER

5. GLOBAL COMPANION ANIMAL POSTOPERATIVE PAIN MANAGEMENT THERAPEUTICS MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Animal
 - 5.2.2. By Product
 - 5.2.3. By Route of Administration

- 5.2.4. By Company (2024)
- 5.2.5. By Region
- 5.3. Market Map

6. NORTH AMERICA COMPANION ANIMAL POSTOPERATIVE PAIN MANAGEMENT THERAPEUTICS MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Animal
 - 6.2.2. By Product
 - 6.2.3. By Route of Administration
 - 6.2.4. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Companion Animal Postoperative Pain Management Therapeutics Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Animal
 - 6.3.1.2.2. By Product
 - 6.3.1.2.3. By Route of Administration
 - 6.3.2. Mexico Companion Animal Postoperative Pain Management Therapeutics Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Animal
 - 6.3.2.2.2. By Product
 - 6.3.2.2.3. By Route of Administration
 - 6.3.3. Canada Companion Animal Postoperative Pain Management Therapeutics Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Animal
 - 6.3.3.2.2. By Product
 - 6.3.3.2.3. By Route of Administration

7. EUROPE COMPANION ANIMAL POSTOPERATIVE PAIN MANAGEMENT THERAPEUTICS MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Animal

7.2.2. By Product

7.2.3. By Route of Administration

7.2.4. By Country

7.3. Europe: Country Analysis

7.3.1. France Companion Animal Postoperative Pain Management Therapeutics Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Animal

7.3.1.2.2. By Product

7.3.1.2.3. By Route of Administration

7.3.2. Germany Companion Animal Postoperative Pain Management Therapeutics Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Animal

7.3.2.2.2. By Product

7.3.2.2.3. By Route of Administration

7.3.3. United Kingdom Companion Animal Postoperative Pain Management Therapeutics Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Animal

7.3.3.2.2. By Product

7.3.3.2.3. By Route of Administration

7.3.4. Italy Companion Animal Postoperative Pain Management Therapeutics Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Animal

7.3.4.2.2. By Product

7.3.4.2.3. By Route of Administration

7.3.5. Spain Companion Animal Postoperative Pain Management Therapeutics Market Outlook

7.3.5.1. Market Size & Forecast

7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Animal

7.3.5.2.2. By Product

7.3.5.2.3. By Route of Administration

8. ASIA-PACIFIC COMPANION ANIMAL POSTOPERATIVE PAIN MANAGEMENT THERAPEUTICS MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Animal

8.2.2. By Product

8.2.3. By Route of Administration

8.2.4. By Country

8.3. Asia-Pacific: Country Analysis

8.3.1. China Companion Animal Postoperative Pain Management Therapeutics Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Animal

8.3.1.2.2. By Product

8.3.1.2.3. By Route of Administration

8.3.2. India Companion Animal Postoperative Pain Management Therapeutics Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Animal

8.3.2.2.2. By Product

8.3.2.2.3. By Route of Administration

8.3.3. South Korea Companion Animal Postoperative Pain Management Therapeutics Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Animal

8.3.3.2.2. By Product

8.3.3.2.3. By Route of Administration

8.3.4. Japan Companion Animal Postoperative Pain Management Therapeutics Market Outlook

8.3.4.1. Market Size & Forecast

8.3.4.1.1. By Value

8.3.4.2. Market Share & Forecast

8.3.4.2.1. By Animal

8.3.4.2.2. By Product

8.3.4.2.3. By Route of Administration

8.3.5. Australia Companion Animal Postoperative Pain Management Therapeutics Market Outlook

8.3.5.1. Market Size & Forecast

8.3.5.1.1. By Value

8.3.5.2. Market Share & Forecast

8.3.5.2.1. By Animal

8.3.5.2.2. By Product

8.3.5.2.3. By Route of Administration

9. SOUTH AMERICA COMPANION ANIMAL POSTOPERATIVE PAIN MANAGEMENT THERAPEUTICS MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Animal

9.2.2. By Product

9.2.3. By Route of Administration

9.2.4. By Country

9.3. South America: Country Analysis

9.3.1. Brazil Companion Animal Postoperative Pain Management Therapeutics Market

Outlook

9.3.1.1. Market Size & Forecast

9.3.1.1.1. By Value

9.3.1.2. Market Share & Forecast

9.3.1.2.1. By Animal

9.3.1.2.2. By Product

9.3.1.2.3. By Route of Administration

9.3.2. Argentina Companion Animal Postoperative Pain Management Therapeutics

Market Outlook

9.3.2.1. Market Size & Forecast

9.3.2.1.1. By Value

9.3.2.2. Market Share & Forecast

9.3.2.2.1. By Animal

9.3.2.2.2. By Product

9.3.2.2.3. By Route of Administration

9.3.3. Colombia Companion Animal Postoperative Pain Management Therapeutics

Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Animal

9.3.3.2.2. By Product

9.3.3.2.3. By Route of Administration

10. MIDDLE EAST AND AFRICA COMPANION ANIMAL POSTOPERATIVE PAIN MANAGEMENT THERAPEUTICS MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Animal

10.2.2. By Product

10.2.3. By Route of Administration

10.2.4. By Country

10.3. MEA: Country Analysis

10.3.1. South Africa Companion Animal Postoperative Pain Management Therapeutics

Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Animal

10.3.1.2.2. By Product

10.3.1.2.3. By Route of Administration

10.3.2. Saudi Arabia Companion Animal Postoperative Pain Management

Therapeutics Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Animal

10.3.2.2.2. By Product

10.3.2.2.3. By Route of Administration

10.3.3. UAE Companion Animal Postoperative Pain Management Therapeutics Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Animal

10.3.3.2.2. By Product

10.3.3.2.3. By Route of Administration

11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

12.1. Merger & Acquisition (If Any)

12.2. Product Launches (If Any)

12.3. Recent Developments

13. PORTERS FIVE FORCES ANALYSIS

13.1. Competition in the Industry

13.2. Potential of New Entrants

13.3. Power of Suppliers

13.4. Power of Customers

13.5. Threat of Substitute Products

14. COMPETITIVE LANDSCAPE

14.1. Zoetis Inc.

- 14.1.1. Business Overview
- 14.1.2. Company Snapshot
- 14.1.3. Products & Services
- 14.1.4. Financials (As Reported)
- 14.1.5. Recent Developments
- 14.1.6. Key Personnel Details
- 14.1.7. SWOT Analysis

14.2. Merck & Co., Inc.

14.3. Elanco Animal Health Inc.

14.4. Ceva Santé Animale S.A.

14.5. Boehringer Ingelheim International GmbH

14.6. Norbrook Laboratories

14.7. Dechra Pharmaceuticals PLC

14.8. Chanelle Pharma

14.9. Bimeda Holdings Limited

14.10. VETOQUINOL S.A.

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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