SCOTTS
INTERNATIONAL

Veterinary Pain Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2021 - 2029

Market Report | 2024-02-17 | 131 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

Report description:

The Veterinary Pain Management Market size is estimated at USD 1.65 billion in 2024, and is expected to reach USD 2.20 billion by 2029, growing at a CAGR of 5.91% during the forecast period (2024-2029).

The global outbreak of COVID-19 impacted the veterinary pain management market, adversely affecting the supply chain of veterinary products. For instance, in April 2020, the Food Agriculture Organization published a new policy regarding the production of livestock and the supply chain of livestock products during the pandemic, which slowed down the supply of veterinary products. However, the high adoption rate of pet animals during the lockdown increased the demand for veterinary pain management drugs. For instance, according to the PDSA PAW report published in June 2021, 2.0 million people in the United Kingdom adopted pets between March 2020 to May 2021. Therefore, owing to such factors, the market has started to gain momentum and is expected to maintain an upward trend over the forecast period.

The growth in the prevalence of painful and inflammatory diseases in animals, the rise in the need for easily accessible and affordable treatment options, and the increase in awareness about animal health and welfare are the major drivers of the market. For instance, according to an article published by Morris Animal Foundation in March 2021, osteoarthritis affects around 14.0 million adult dogs in the United States every year, and owners have consistently reported it as a top health concern among pets. Similarly, according to an article published by American Animal Health Association in April 2021, approximately 6.0 million dogs are diagnosed with cancer each year. The same source also stated that around one in four dogs would develop cancer at some point, and nearly 50.0% of dogs older than ten would develop some form of cancer.

Per the report published by the CDC in September 2021, Bovine Spongiform Encephalopathy (BSE) is one of the most prevalent chronic diseases among cattle in Canada. The report stated that the true prevalence of Bovine Spongiform Encephalopathy (BSE) in Canada was around 90.0%, which is higher than the prevalence of BSE in the United States (3.0 to 8.0 cases per million in Canada and around 0.167 cases per million in the United States). Such a high prevalence of diseases is anticipated to propel the demand for veterinary pain management drugs, thereby boosting the market's growth.

Rising initiatives by the government and other organizations are also expected to positively impact the market. For instance, in October 2020, FECAVA launched a campaign titled "FECAVA Basic Practices in Anesthesia and Analgesia," which includes important lectures around Europe in the upcoming years and a series of six ready-to-use, printable posters/infographics regarding anesthesia and pain management in animals. Such supportive initiatives are expected to create new opportunities for the market in the coming years.

New product launches by the key players in the market are also expected to propel the market's growth. For instance, in January 2022, the US FDA approved Zorbium (buprenorphine transdermal solution), the first transdermal buprenorphine animal medication for post-surgical pain management in cats. This approval provides veterinarians with another option for controlling postoperative pain in cats. Thus, owing to such factors, considerable market growth is anticipated over the forecast period.

However, side effects associated with treatment and the high cost of certain products are likely to impede the market growth over the forecast period.

Veterinary Pain Management Market Trends

Laser Therapy is Expected to Witness Considerable Growth Over the Forecast Period

Laser therapy is used for chronic and acute injuries, arthritis, sprains and strains, swelling due to back disc problems, and muscular-skeletal abnormalities. It also helps to regenerate nerve tissue post-surgery. The most common laser therapy is the therapeutic laser treatment of osteoarthritis (OA) in dogs and cats. The laser intensity in osteoarthritis (OA) is most appropriate: 8-10 J/cm2. Tendonitis may also benefit from laser therapy due to the inflammation associated with the disease.

Some laser devices can be used both for surgical and therapeutic purposes by controlling the level of emission. Some of the laser therapy brands for veterinary pain management include B-Cure Laser, TENDLITE, Lumasoothe, iReliev, Keebomed, and MLS Laser Therapy (ASAveterinary), among others.

Market players adopt and implement various strategies, such as product launches, collaborations, expansions, and mergers. For instance, in October 2021, Summus Laser introduced ''Horizon Veterinary Laser System,'' a Class IV laser therapy system designed specifically for veterinary pain management. It is a diode-based laser with 28-watt power and has the unique capability of combining four different wavelengths, which can be controlled independently as well. Therefore, owing to the aforementioned factors, the segment is expected to witness considerable growth over the forecast period.

North America is Expected to Witness Significant Growth Over the Forecast Period

North America is expected to dominate the overall veterinary pain management market over the forecast period. The growth is due to factors such as rising pet adoption and the increasing per capita animal healthcare expenditure in the region. The rise in the prevalence of various animal diseases and injuries has been identified as the major factor fueling the market's growth.

According to the American Pet Products Association's 2021-2022 National Pet Owners Survey, around 69.0 million Americans own a dog, 45.3 million own cats, 11.8 own freshwater fish, 9.9 million own birds, 6.2 million own small animals, 5.7 million own reptiles, 3.5 million own horses, and 2.9 million own saltwater fish. With the increased ownership of pets and livestock, US citizens have also become more considerate toward the health of these animals. As per the data provided by America Veterinary Medical

Association, in March 2020, approximately USD 29.3 billion was spent in the country on veterinary care and services. Thus, with the increased awareness and expenditure regarding animal health, the market is expected to show significant growth over the forecast period in North America.

The rising partnerships/agreements, mergers, and acquisitions between companies are fueling the market growth in the United States. Many companies are launching new products in the market. For instance, in 2020, the US FDA approved Cronus Pharma Specialties' Carprofen Chewable Tablets (generic version of Rimadyl-Zoetis) for dogs. This nonsteroidal anti-inflammatory drug (NSAID) has been proven safe and effective in relieving pain and inflammation associated with osteoarthritis. Furthermore, it helps control postoperative pain associated with soft tissue and orthopedic surgeries.

Hence, owing to the factors mentioned above, along with the rising prevalence of inflammatory diseases in animals, the veterinary pain management market is expected to grow over the forecast period.

Veterinary Pain Management Industry Overview

The veterinary pain management market is moderately competitive, with the presence of both international and local companies. The competitive landscape includes an analysis of a few international as well as local companies that hold market shares and are well known, including Ceva Sante Animale, Elanco Animal Health Incorporated, Zoetis Inc., Vetoquinol SA, and Boehringer Ingelheim International GmbH.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value - USD million)
5.1 By Product
5.1.1 Drugs
5.1.1.1 NSAIDs
5.1.1.2 Anesthetics
5.1.1.3 Opioids
5.1.1.4 Other Drugs
5.1.2 Devices
5.1.2.1 Laser Therapy
5.1.2.2 Electromagnetic Therapy
5.2 By Application
5.2.1 Osteoarthritis and Joint Pain
5.2.2 Postoperative Pain
5.2.3 Cancer
5.2.4 Other Applications
5.3 By Animal Type
5.3.1 Companion
5.3.2 Livestock
5.4 By End User
5.4.1 Hospitals and Clinics
5.4.2 Retail Outlet and Others
5.5 Geography
5.5.1 North America
5.5.1.1 United States
5.5.1.2 Canada
5.5.1.3 Mexico
5.5.2 Europe
5.5.2.1 Germany
5.5.2.2 United Kingdom
5.5.2.3 France
5.5.2.4 Italy
5.5.2.5 Spain
5.5.2.6 Rest of Europe
5.5.3 Asia-Pacific
5.5.3.1 China
5.5.3.2 Japan
5.5.3.3 India
5.5.3.4 Australia
5.5.3.5 South Korea
5.5.3.6 Rest of Asia-Pacific
5.5.4 Middle East and Africa
5.5.4.1 GCC
5.5.4.2 South Africa
5.5.4.3 Rest of Middle East and Africa
5.5.5 South America

SCOTTS INTERNATIONAL

Veterinary Pain Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2021 - 2029

Market Report | 2024-02-17 | 131 pages | Mordor Intelligence

To place an Order with Scotts International:
- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	$4750.00
	Team License (1-7 Users)	$5250.00
	Site License	$6500.00
	Corporate License	$8750.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-02-27
		Signature	

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com