

Veterinary Vaccine Market - A Global and Regional Analysis: Focus on Type, Disease, Technology, Route of Administration, Distribution Channel, and Region - Analysis and Forecast, 2023-2033

<https://marketpublishers.com/r/V0B1DA062CC3EN.html>

Date: January 2024

Pages: 165

Price: US\$ 4,950.00 (Single User License)

ID: V0B1DA062CC3EN

Abstracts

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Global Veterinary Vaccine Market Overview

In 2022, the global veterinary vaccine market held a value of \$9.44 billion. The market is expected to grow at a CAGR of 7.30% during the forecast period 2023-2033 and attain a value of \$19.86 billion by 2033. The market's trajectory suggests a transformative impact on veterinary healthcare, with companies adept at addressing regulatory complexities and embracing technological innovations poised for significant success.

Market Lifecycle Stage

The global veterinary vaccine market is in a growing mature phase. Characterized by a significant increase in demand and adoption, this stage reflects the rising recognition and acceptance of veterinary vaccines. Key drivers include the growing population of animals and awareness of vaccines, government initiatives for promoting veterinary health, and increasing emphasis on disease prevention. Due to challenges such as regulatory complexities and high cost of research and development (R&D) of veterinary vaccines, the overall trajectory suggests a dynamic and expanding market.

Industry Impact

The veterinary vaccine market holds significant importance in the animal health

industry, with profound impacts on both animal welfare and public health. The availability and widespread use of effective vaccines contribute to the prevention and control of various infectious diseases in animals, ranging from pets to livestock. This not only safeguards the health and well-being of individual animals but also plays a crucial role in maintaining the overall health of animal populations. Furthermore, by preventing the transmission of zoonotic diseases from animals to humans, veterinary vaccines contribute to public health and reduce the risk of disease outbreaks.

The industry's advancements in vaccine research and development continually address emerging infectious threats, promoting sustainability in agriculture, ensuring food safety, and fostering a harmonious coexistence between humans and animals. As a result, the veterinary vaccine market's impact extends beyond animal health, making it an integral component of global health strategies and broader ecosystem.

Market Segmentation:

Segmentation 1: by Type

Livestock Vaccines

Bovine Vaccines

Small Ruminant Vaccines

Porcine Vaccines

Poultry Vaccines

Companion Animal Vaccines

Canine Vaccines

Feline Vaccines

Equine Vaccines

Aquaculture Vaccines

Livestock Vaccines to Dominate the Global Veterinary Vaccine Market (by Type)

The livestock vaccines segment dominated the global veterinary vaccine market (by type) in FY2022. The dominance of livestock vaccines in the global veterinary vaccine market, categorized by type, underscores the critical role these vaccines play in safeguarding the health and productivity of livestock populations. Livestock vaccines are instrumental in preventing and controlling a variety of infectious diseases that can have profound economic implications for the agriculture sector. As livestock farming continues to be a significant component of the global food supply chain, the demand for vaccines tailored to the specific needs of cattle, poultry, swine, and other livestock remains high.

Segmentation 2: by Disease

African Swine Fever

Foot and Mouth Disease

Newcastle Disease

Avian Influenza (Bird Flu)

Peste des Petits Ruminants

Other Diseases

Avian Influenza (Bird Flu) to Dominate the Global Veterinary Vaccine Market (by Disease)

Avian influenza (bird flu) dominated the global veterinary vaccine market (by disease) in FY2022. Avian influenza is a highly contagious viral infection that primarily affects birds, including poultry. Given the potential for rapid transmission and severe economic consequences in the poultry industry, there is a heightened focus on developing and administering effective vaccines to prevent and control avian influenza outbreaks.

Segmentation 3: by Technology

Live Attenuated Vaccines

Inactivated Vaccines

Toxoid Vaccines

Recombinant Vaccines

Conjugate Vaccines

Other Vaccines

Inactivated Vaccines to Dominate the Global Veterinary Vaccine Market (by Technology)

The global veterinary vaccine market (by technology) was dominated by the inactivated vaccines segment in FY2022. Inactivated vaccines, also known as killed vaccines, are produced from pathogens that have been rendered non-infectious, typically through processes such as heat or chemicals. This technology offers a safe and effective means of stimulating an immune response in animals without the risk of causing disease. The prevalence of inactivated vaccines in the veterinary market underscores their established track record in providing protection against various diseases in animals.

Segmentation 4: by Route of Administration

Injectable Vaccines

Oral Vaccines

Intranasal/Spray Vaccines

Injectable Vaccines to Dominate the Global Veterinary Vaccine Market (by Route of Administration)

The global veterinary vaccine market (by route of administration) was dominated by the injectable vaccines segment in FY2022. Injectable vaccines are administered through injection, providing a direct and efficient means of delivering antigens to stimulate an immune response in animals. This route of administration is commonly used across

various species, including livestock and companion animals. The dominance of injectable vaccines underscores their practicality, ease of administration, and established effectiveness in promoting immunity against a range of diseases.

Segmentation 5: by Distribution Channel

Veterinary Hospitals and Clinics

Retail Pharmacies

Veterinary Research Institutes

Veterinary Hospitals and Clinics to Continue its Dominance in the Global Veterinary Vaccine Market (by Distribution Channel)

The veterinary hospitals and clinics segment accounted for the largest share of the global veterinary vaccine market (by distribution channel) in FY2022. Veterinary hospitals and clinics serve as primary points of contact for animal owners seeking preventive healthcare for their pets and livestock. These establishments not only provide vaccination services but also offer expertise and guidance on the appropriate immunization schedules and tailored healthcare plans for individual animals. The dominance of this distribution channel reflects the trust placed in professional veterinary care and the integral role veterinarians play in promoting animal health.

Segmentation 6: by Region

North America

Europe

Asia-Pacific

Latin America

Middle East and Africa

Among regions, North America held the largest market value in 2022, and the trend is

anticipated to continue during the forecast period 2023-2033.

Demand – Drivers, Restraints, and Opportunities

Market Drivers:

Growing Population of Animals and Awareness of Vaccine: The global veterinary vaccine market is experiencing a notable upswing, primarily propelled by the escalating population of animals and the rising incidence of veterinary diseases. As the demand for effective healthcare solutions for animals intensifies, the veterinary vaccine market has become a crucial component in safeguarding the health and well-being of diverse animal species.

Market Restraints:

High Cost of Research and Development (R&D) of Veterinary Vaccine: The high cost of researching and developing veterinary vaccines can be a major obstacle to their development and accessibility, posing challenges for both animal health and veterinary industry. The intricate nature of developing vaccines tailored for diverse animal species, coupled with rigorous regulatory requirements, contributes to elevated expenses, thereby affecting the accessibility and affordability of veterinary vaccines.

Market Opportunities:

Technological Advancements in Veterinary Vaccine: Technological advancements in veterinary vaccine development present significant opportunities for the veterinary vaccine market. Innovations such as genetic engineering, adjuvant technologies, and novel delivery methods enhance vaccine efficacy, safety, and convenience.

How can this report add value to an organization?

Workflow/Innovation Strategy: The veterinary vaccine market (by type) has been segmented into detailed segments of types of vaccines based on species, including livestock, poultry, porcine, companion animals, and aquaculture animals. Moreover, the study provides the reader with a detailed understanding of the different technologies and diseases.

Growth/Marketing Strategy: The veterinary vaccine market encompasses a range of vaccinations available for animals. Since the market is in a growing mature phase, there

are upcoming technologies present that can further enhance the adoption of veterinary vaccines in the market.

Competitive Strategy: Key players in the global veterinary vaccine market have been analyzed and profiled in the study, including manufacturers involved in new product launches, acquisitions, expansions, and strategic collaborations. Moreover, a detailed competitive benchmarking of the players operating in the global veterinary vaccine market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Methodology

Key Considerations and Assumptions in Market Engineering and Validation

The base year considered for the calculation of the market size is 2022. The historical year analysis has been done from FY2020 to FY2021, and the market size has been calculated for FY2022 and projected for the period 2023-2033.

The geographical distribution of the market revenue is estimated to be the same as the company's net revenue distribution. All the numbers are adjusted to two digits after decimals for report presentation reasons. However, the real figures have been utilized for compound annual growth rate (CAGR) estimation. CAGR is calculated from 2023 to 2033.

The market has been mapped based on different types of products available in the market and based on several indications. All the key manufacturing companies that have a significant number of offerings to the veterinary vaccine market have been considered and profiled in the report.

In the study, the primary respondent's verification has been considered to finalize the estimated market for the veterinary vaccine market.

The latest annual reports of each market player have been taken into consideration for market revenue calculation.

Market strategies and developments of key players have been considered for the calculation of sub-segment split.

The base currency considered for the market analysis is US\$. Currencies other than the US\$ have been converted to the US\$ for all statistical calculations, considering the average conversion rate for that particular year. The currency conversion rate has been taken from the historical exchange rate of the Oanda website or from the annual reports of the respective company, if stated.

Primary Research

The key data points taken from the primary sources include:

Validation and triangulation of all the numbers and graphs

Validation of the report's segmentation and key qualitative findings

Understanding of the numbers of the various markets for market type

Percentage split of individual markets for regional analysis

Secondary Research

Open Sources

World Organization for Animal Health (WOAH), Food and Agriculture Organization of the United Nations (FAO), PubMed, and National Center for Biotechnology Information (NCBI)

Annual reports, SEC filings, and investor presentations of the leading market players

Company websites and detailed study of their portfolio

Gold standard magazines, journals, whitepapers, press releases, and news articles

Databases

The key data points taken from the secondary sources include:

Segmentations, split-ups, and percentage shares

Data for market value

Key industry trends of the top players in the market

Qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

Quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The global veterinary vaccine market is a dynamic and rapidly evolving sector that plays a crucial role in maintaining animal health and safeguarding public health. With a focus on preventing and controlling infectious diseases in various animal species, including livestock, pets, and wildlife, the market has witnessed significant growth in recent years.

Key factors driving this expansion include rising awareness about zoonotic diseases, increasing demand for animal protein, and growing emphasis on animal welfare. The market is characterized by a diverse range of vaccines targeting different pathogens, with ongoing advancements in research and development contributing to the introduction of innovative and more effective vaccine formulations.

Some of the prominent companies in this market are:

Boehringer Ingelheim International GmbH

Ceva Santé Animale

Elanco Animal Health Incorporated

Merck & Co., Inc. (Merck Animal Health)

Zoetis, Inc.

Phibro Animal Health Corporation

Virbac

Companies that are not a part of the aforementioned pool have been well-represented across different sections of the report (wherever applicable).

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