

Global Swine Atrophic Rhinitis Vaccine Market Growth 2026-2032

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Abstracts

The global Swine Atrophic Rhinitis Vaccine market size is predicted to grow from US\$ 112 million in 2025 to US\$ 147 million in 2032; it is expected to grow at a CAGR of 4.0% from 2026 to 2032.

Swine Atrophic Rhinitis Vaccine is a veterinary biological product used to prevent and control swine atrophic rhinitis, progressive atrophic rhinitis and related upper respiratory lesions. It is mainly administered to gilts and sows so that piglets can obtain passive protection through maternally derived antibodies, reducing the risk of turbinate atrophy, sneezing, nasal bleeding, growth retardation and secondary infections. The product is usually based on inactivated *Bordetella bronchiseptica* cells, *Pasteurella multocida* toxin or toxoid antigens, and may also be formulated as a combination vaccine with antigens against swine erysipelas, pasteurellosis-related pneumonia and other diseases. Main dosage forms include injectable emulsions or suspensions. Key upstream materials include production strains, bacterial culture media, fermentation consumables, inactivating agents, toxin or toxoid preparation materials, adjuvants, buffers, stabilizers, sterile filling materials, glass or plastic vials, rubber stoppers, aluminum caps, labels and cold-chain packaging materials. Downstream customers mainly include breeding farms, sow farms, large integrated swine producers, commercial pig farms, veterinary service providers, animal health distributors and regional animal disease control procurement channels. On an ex-factory basis, global effective capacity of this product category is estimated at around 390 million doses in 2025, with sales volume of approximately 274 million doses and an average ex-factory price of about USD 0.42 per dose. The industry gross margin in 2025 is estimated at roughly 42%-62%, with multinational brands and combination vaccines usually positioned at the upper end of the range, while regional single vaccines and conventional bacterin-toxoid products are more commonly positioned in the middle to lower part of the range.

The Swine Atrophic Rhinitis Vaccine market is a mature segment within swine respiratory vaccines, with demand mainly supported by continued investment in early piglet health management by breeding farms, sow farms and large-scale swine producers. Although clinical incidence has declined in some high-health-status farms, the disease still requires prevention in regions with uneven biosecurity standards, frequent gilt introduction and high pressure on sow herd management. Current use is increasingly concentrated in sow vaccination and maternally derived antibody protection, with producers focusing more on the indirect benefits of reducing nasal lesions, improving piglet health around weaning and supporting later growth performance. Overall, this is not a high-growth category, but it remains a stable component of basic prevention programs in many swine production systems.

Looking ahead, the market will increasingly upgrade toward combination vaccines and integrated sow immunization programs. The share of standalone atrophic rhinitis vaccines may gradually decline, while combination products linked with swine erysipelas, pasteurellosis-related pneumonia or other bacterial respiratory pathogens are more likely to be accepted by large farms. Breeding farms and large sow units generally prefer to cover more disease risks with fewer vaccinations, reducing labor intensity, lowering handling stress and improving compliance with immunization programs. Product upgrading will mainly focus on toxin antigen processing, toxoid stability, adjuvant safety, maternally derived antibody transfer efficiency and batch consistency. Companies with stable quality control and strong farm-level service capabilities are expected to remain more competitive in this stock-based market.

The main growth drivers come from the industrialization of pig farming, more refined breeding herd health management, standardized sow vaccination programs and producers' increasing attention to early piglet loss control. For high-density farms, nasal lesions, higher respiratory susceptibility and later production performance losses can amplify hidden economic costs, making preventive immunization still valuable. Biosecurity upgrades and frequent herd replacement in some regions also support relatively stable demand from breeding and sow farms. At the same time, multinational animal health companies consolidate the premium market through mature combination vaccines and technical services, while local suppliers compete mainly through cost advantages, channel coverage and regional service capabilities.

Key constraints include lower visible disease awareness, pork price cycles, pressure on farm vaccine budgets and insufficient attention to atrophic rhinitis prevention in some markets. As overall farm management improves, clinical cases may decline in certain

regions, putting pressure on standalone vaccine demand. During weak pork price cycles, small and medium-sized farms may prioritize vaccines for diseases with higher morbidity or mortality and reduce purchases of products associated with less visible losses. Differences in veterinary vaccine registration, import approval and batch release requirements across countries also increase the difficulty of cross-regional commercialization. Overall, the market is expected to maintain stable but moderate growth, with the main opportunities coming from combination vaccine substitution, sow immunization program upgrades and regional maintenance of existing demand.

LP Information, Inc. (LPI) ' newest research report, the "Swine Atrophic Rhinitis Vaccine Industry Forecast" looks at past sales and reviews total world Swine Atrophic Rhinitis Vaccine sales in 2025, providing a comprehensive analysis by region and market sector of projected Swine Atrophic Rhinitis Vaccine sales for 2026 through 2032. With Swine Atrophic Rhinitis Vaccine sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Swine Atrophic Rhinitis Vaccine industry.

This Insight Report provides a comprehensive analysis of the global Swine Atrophic Rhinitis Vaccine landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Swine Atrophic Rhinitis Vaccine portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Swine Atrophic Rhinitis Vaccine market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Swine Atrophic Rhinitis Vaccine and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Swine Atrophic Rhinitis Vaccine.

This report presents a comprehensive overview, market shares, and growth opportunities of Swine Atrophic Rhinitis Vaccine market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Single Vaccine

Dual Vaccine

Others

Segmentation by Target Animal:

Gilts

Sows

Piglets

Other

Segmentation by Dose Pack Size:

Small Pack (Below 20 Doses per Vial)

Medium Pack (20-50 Doses per Vial)

Large Pack (Above 50 Doses per Vial)

Segmentation by Application:

Large-scale Pig Farming Groups

Breeding Pig Farms

Veterinary Service Providers

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Merck Animal Health

HIPRA

Elanco Animal Health

Virbac

Bioveta

Nisseiken

Kyoto Biken Laboratories

KBNP

Wuhan Keqian Biology

Pulike Biological Engineering

Key Questions Addressed in this Report

What is the 10-year outlook for the global Swine Atrophic Rhinitis Vaccine market?

What factors are driving Swine Atrophic Rhinitis Vaccine market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?
How do Swine Atrophic Rhinitis Vaccine market opportunities vary by end market size?
How does Swine Atrophic Rhinitis Vaccine break out by Type, by Application?

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