

# **Veterinary Vaccines Market by Type (Porcine, Poultry, Livestock, Companion Animals), Technology (Live Attenuated, Inactivated, Toxoid), Route of Administration (Injection, Intranasal), Distribution Channel (Hospitals, Clinics) - Global Forecast to 2027**

<https://marketpublishers.com/r/AF1F003A9FDEN.html>

Date: April 2023

Pages: 293

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

ID: AF1F003A9FDEN

## **Abstracts**

The global veterinary vaccines market is projected to reach USD 10.8 billion by 2027 from USD 8.1 billion in 2022, at a CAGR of 5.9% during the forecast period. In emerging countries such as India and China, the pet insurance industry is in the nascent stage. The increasing disposable incomes and rising pet expenditure are expected to increase the adoption of pet insurance policies and support the veterinary health industry.

Bovine vaccines segment accounted for a larger share of the livestock vaccines market

In 2021, the bovine vaccines segment accounted for a larger share of the livestock vaccines market. This segment is also estimated to grow at a higher CAGR during the forecast period. Growth in this segment can primarily be attributed to the increasing demand for meat and milk and increased awareness about the prevention of diseases in livestock.

The recombinant vaccines will grow at highest CAGR during the forecast period

Based on technology, the recombinant vaccines will grow at highest CAGR during the forecast period. The major advantages offered by recombinant vaccines include the lack of need for adjuvants and the stability offered by these vaccines that allows them to remain viable at ambient temperatures. Also, these vaccines are free from pathogen contamination, exhibit no post-vaccination reactions, and offer higher safety

North America accounted for the second largest share of the global veterinary vaccines market

In 2021, North America accounted for a share of the global veterinary vaccines market. The increasing animal population and growing animal disease prevalence, rising awareness of veterinary vaccines, and the increasing demand for animal products are the major factors that are expected to drive the growth of the veterinary vaccines market in North America. In addition to the increasing healthcare expenditure, there has been a surge in the pet health insurance industry.

The break-up of the profile of primary participants in the veterinary vaccines market:

By Company Type: Tier 1 – 60%, Tier 2 – 30%, and Tier 3 – 10%

By Designation: C Level – 30%, Director Level – 50%, Others-20%

By Region: North America – 45%, Europe – 15%, Asia Pacific – 25%, Middle East – 5%, and Latin America –10%

The prominent players in the veterinary vaccines market include Zoetis, Inc. (US), Merck & Co, Inc. (US), Boehringer Ingelheim International GmbH (Germany), Elanco Animal Health (US), Virbac (France).

Research Coverage:

The report analyzes the veterinary vaccines market and aims at estimating the market size and future growth potential of this market based on various segments such as type, disease, technology, route of administration, distribution channel and region. The report also includes a product portfolio matrix of various veterinary vaccines available in the market. The report also provides a competitive analysis of the key players in this market, along with their company profiles, product offerings, and key market strategies.

Reasons to Buy the Report

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall veterinary vaccines market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and to

plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

This report provides insights into the following pointers:

Analysis of key drivers (growth in the companion animal population, rising incidence of zoonotic diseases, initiatives by various government agencies and animal associations, rising demand for animal-derived food products, growing demand for pet insurance, and rising animal health expenditure), restraints (the high storage cost of vaccines and rising pet care costs), opportunities (technological advancements and untapped emerging markets), and challenges (inadequate surveillance and reporting systems and lack of animal healthcare awareness emerging countries) influencing the growth of the veterinary vaccines market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the veterinary vaccines market

Market Development: Comprehensive information on the lucrative emerging markets by type, disease, technology, route of administration, distribution channel and region.

Market Diversification: Exhaustive information about new products or product enhancements, growing geographies, recent developments, and investments in the global veterinary veterinary market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, product offerings, competitive leadership mapping, and capabilities of leading players like Zoetis, Inc. (US), Merck & Co, Inc. (US), Boehringer Ingelheim International GmbH (Germany), Elanco Animal Health (US), Virbac (France) in the global veterinary vaccines market.

## Contents

### 1 INTRODUCTION

#### 1.1 STUDY OBJECTIVES

#### 1.2 MARKET DEFINITION

##### 1.2.1 INCLUSIONS AND EXCLUSIONS

#### 1.3 MARKET SCOPE

##### 1.3.1 MARKETS COVERED

##### 1.3.2 YEARS CONSIDERED

#### 1.4 CURRENCY CONSIDERED

#### TABLE 1 STANDARD CURRENCY CONVERSION RATES

#### 1.5 LIMITATIONS

#### 1.6 STAKEHOLDERS

#### 1.7 SUMMARY OF CHANGES

#### 1.8 RECESSION IMPACT

### 2 RESEARCH METHODOLOGY

#### 2.1 RESEARCH DATA

#### FIGURE 1 RESEARCH DESIGN

##### 2.1.1 SECONDARY DATA

##### 2.1.1.1 Key data from secondary sources

##### 2.1.2 PRIMARY DATA

#### FIGURE 2 PRIMARY SOURCES

##### 2.1.2.1 Key data from primary sources

##### 2.1.2.2 Key industry insights

#### FIGURE 3 BREAKDOWN OF PRIMARY INTERVIEWS: SUPPLY-SIDE AND DEMAND-SIDE PARTICIPANTS

#### FIGURE 4 BREAKDOWN OF PRIMARY INTERVIEWS: SUPPLY-SIDE PARTICIPANTS, BY COMPANY TYPE, DESIGNATION, AND REGION

#### FIGURE 5 BREAKDOWN OF PRIMARY INTERVIEWS: DEMAND-SIDE PARTICIPANTS, BY END USER, DESIGNATION, AND REGION

#### 2.2 MARKET SIZE ESTIMATION

#### FIGURE 6 VETERINARY VACCINES MARKET: SUPPLY-SIDE MARKET SIZE ESTIMATION

#### FIGURE 7 REVENUE SHARE ANALYSIS ILLUSTRATION: MERCK & CO., IN.

#### FIGURE 8 VETERINARY VACCINES MARKET: SUPPLY-SIDE ANALYSIS OF LEADING COMPANIES (2021)

FIGURE 9 VETERINARY VACCINES MARKET: CAGR PROJECTION FROM ANALYSIS OF DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES (2022–2027)

FIGURE 10 CAGR PROJECTION: SUPPLY-SIDE ANALYSIS

FIGURE 11 TOP-DOWN APPROACH

2.3 MARKET BREAKDOWN AND DATA TRIANGULATION

FIGURE 12 MARKET DATA TRIANGULATION METHODOLOGY

2.4 MARKET SHARE ANALYSIS

2.5 STUDY ASSUMPTIONS

2.6 RISK ASSESSMENT

TABLE 2 VETERINARY VACCINES MARKET: RISK ASSESSMENT ANALYSIS

2.7 LIMITATIONS

2.7.1 METHODOLOGY-RELATED LIMITATIONS

2.7.2 SCOPE-RELATED LIMITATIONS

2.8 VETERINARY VACCINES MARKET: RECESSION IMPACT

### **3 EXECUTIVE SUMMARY**

FIGURE 13 VETERINARY VACCINES MARKET, BY TYPE, 2022 VS. 2027 (USD MILLION)

FIGURE 14 VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2022 VS. 2027 (USD MILLION)

FIGURE 15 VETERINARY VACCINES MARKET, BY DISEASE, 2022 VS. 2027 (USD MILLION)

FIGURE 16 VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2022 VS. 2027 (USD MILLION)

FIGURE 17 VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2022 VS. 2027 (USD MILLION)

FIGURE 18 VETERINARY VACCINES MARKET: GEOGRAPHICAL SNAPSHOT

### **4 PREMIUM INSIGHTS**

4.1 VETERINARY VACCINES MARKET OVERVIEW

FIGURE 19 RISING GROWTH IN COMPANION ANIMAL POPULATION TO DRIVE MARKET

4.2 ASIA PACIFIC: VETERINARY VACCINES MARKET, BY TECHNOLOGY (2021)

FIGURE 20 LIVE ATTENUATED VACCINES SEGMENT ACCOUNTED FOR LARGEST MARKET SHARE IN 2021

4.3 VETERINARY VACCINES MARKET: GEOGRAPHIC GROWTH OPPORTUNITIES

FIGURE 21 CHINA TO WITNESS HIGHEST CAGR DURING FORECAST PERIOD

4.4 VETERINARY VACCINES MARKET, BY REGION

FIGURE 22 ASIA PACIFIC REGION TO DOMINATE MARKET DURING FORECAST PERIOD

4.5 VETERINARY VACCINES MARKET: DEVELOPED VS. EMERGING ECONOMIES

FIGURE 23 EMERGING ECONOMIES TO REGISTER HIGHER GROWTH RATE DURING FORECAST PERIOD

## 5 MARKET OVERVIEW

### 5.1 INTRODUCTION

### 5.2 MARKET DYNAMICS

FIGURE 24 VETERINARY VACCINES MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

#### 5.2.1 DRIVERS

5.2.1.1 Growth in companion animal population

TABLE 3 EUROPEAN PET POPULATION, BY ANIMAL, 2016–2022 (MILLION)

5.2.1.2 Rising incidence of zoonotic diseases

TABLE 4 ANIMAL DISEASE OUTBREAKS IN ASIA PACIFIC COUNTRIES (2009–2019)

5.2.1.3 Initiatives by various government agencies and animal associations

5.2.1.4 Rising demand for animal-derived food products

TABLE 5 PAST AND PROJECTED TRENDS IN CONSUMPTION OF MEAT AND MILK (DEVELOPED VS. EMERGING MARKETS)

TABLE 6 ASIA: COUNTRY-LEVEL CONSUMPTION OF ANIMAL-DERIVED FOOD PRODUCTS, 2020 VS. 2030 (THOUSAND METRIC TONS)

TABLE 7 ASIA: COUNTRY-LEVEL PRODUCTION OF ANIMAL-DERIVED FOOD PRODUCTS, 2020 VS. 2030 (THOUSAND METRIC TONS)

5.2.1.5 Growing demand for pet insurance and rising animal health expenditure

TABLE 8 US: AVERAGE PREMIUMS PAID (2019–2021)

FIGURE 25 CANADA: AVERAGE ANNUAL PREMIUMS, 2017–2021

FIGURE 26 US: PET INDUSTRY EXPENDITURE, 2010–2021

TABLE 9 US: BREAKDOWN OF PET INDUSTRY EXPENDITURE, 2020 VS. 2021 (USD BILLION)

TABLE 10 NORTH AMERICA: PET HEALTH INSURANCE MARKET, 2012–2021 (USD MILLION)

#### 5.2.2 RESTRAINTS

5.2.2.1 High storage cost of vaccines

5.2.2.2 Rising pet care costs

**FIGURE 27 US: BASIC ANNUAL EXPENSES FOR DOGS AND CATS, 2021****5.2.3 OPPORTUNITIES****5.2.3.1 Technological advancements****5.2.3.2 Untapped emerging markets****5.2.4 CHALLENGES****5.2.4.1 Inadequate surveillance and reporting systems****5.2.4.2 Lack of animal healthcare awareness in emerging countries****5.3 INDUSTRY TRENDS****5.3.1 GROWING SCALE OF VETERINARY BUSINESSES****5.4 REGULATORY ANALYSIS****5.4.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS****TABLE 11 LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS****5.4.2 US****5.4.3 EUROPE****5.4.4 REST OF THE WORLD****5.5 VALUE CHAIN ANALYSIS****FIGURE 28 VETERINARY VACCINES MARKET: VALUE CHAIN ANALYSIS****5.6 SUPPLY CHAIN ANALYSIS****FIGURE 29 VETERINARY VACCINES MARKET: SUPPLY CHAIN ANALYSIS****5.7 ECOSYSTEM ANALYSIS****FIGURE 30 VETERINARY VACCINES MARKET: ECOSYSTEM ANALYSIS****5.8 PORTER'S FIVE FORCES ANALYSIS****TABLE 12 PORTER'S FIVE FORCES ANALYSIS****5.8.1 THREAT OF NEW ENTRANTS****5.8.2 THREAT OF SUBSTITUTES****5.8.3 BARGAINING POWER OF SUPPLIERS****5.8.4 BARGAINING POWER OF BUYERS****5.8.5 INTENSITY OF COMPETITIVE RIVALRY****5.9 PATENT ANALYSIS****5.9.1 PATENT PUBLICATION TRENDS FOR VETERINARY VACCINES****FIGURE 31 PATENT PUBLICATION TRENDS (JANUARY 2013–MARCH 2023)****5.9.2 JURISDICTION AND TOP APPLICANT ANALYSIS****FIGURE 32 TOP APPLICANTS AND OWNERS (COMPANIES/INSTITUTIONS) FOR VETERINARY VACCINES PATENTS (JANUARY 2013–MARCH 2023)****FIGURE 33 TOP APPLICANT COUNTRIES/REGIONS FOR VETERINARY VACCINES PATENTS (JANUARY 2013–MARCH 2023)****5.10 TECHNOLOGY ANALYSIS**



## 5.11 INDICATIVE PRICING MODEL ANALYSIS

### TABLE 13 AVERAGE SELLING PRICE OF VETERINARY VACCINES

#### 5.11.1 AVERAGE SELLING PRICE TRENDS

## 5.12 KEY CONFERENCES AND EVENTS (2023–2025)

### TABLE 14 VETERINARY VACCINES MARKET: DETAILED LIST OF CONFERENCES AND EVENTS

## 5.13 KEY STAKEHOLDERS AND BUYING CRITERIA

#### 5.13.1 KEY STAKEHOLDERS IN BUYING PROCESS

### FIGURE 34 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR VETERINARY VACCINES

### TABLE 15 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR VETERINARY VACCINES

#### 5.13.2 BUYING CRITERIA

### FIGURE 35 KEY BUYING CRITERIA FOR VETERINARY VACCINES

### TABLE 16 KEY BUYING CRITERIA FOR VETERINARY VACCINES

## 6 VETERINARY VACCINES MARKET, BY TYPE

### 6.1 INTRODUCTION

#### TABLE 17 VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

### 6.2 LIVESTOCK VACCINES

#### TABLE 18 LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

#### TABLE 19 LIVESTOCK VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

#### 6.2.1 BOVINE VACCINES

##### 6.2.1.1 Bovine vaccines segment to dominate market

#### TABLE 20 BOVINE VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

#### 6.2.2 SMALL RUMINANT VACCINES

##### 6.2.2.1 Small ruminant vaccines segment to register lower growth in livestock vaccines market

#### TABLE 21 SMALL RUMINANT VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

### 6.3 PORCINE VACCINES

#### 6.3.1 SECOND-LARGEST MARKET DURING FORECAST PERIOD

#### TABLE 22 PORCINE VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

### 6.4 POULTRY VACCINES

#### 6.4.1 INCREASED PRODUCTION AND REARING OF POULTRY TO DRIVE MARKET GROWTH



TABLE 23 POULTRY VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

#### 6.5 COMPANION ANIMAL VACCINES

TABLE 24 COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 25 COMPANION ANIMAL VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

##### 6.5.1 CANINE VACCINES

6.5.1.1 Canine vaccines segment to dominate companion animal vaccines market during forecast period

TABLE 26 CANINE VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

##### 6.5.2 FELINE VACCINES

6.5.2.1 Rising prevalence of zoonotic diseases to drive demand for feline vaccines

TABLE 27 FELINE VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

#### 6.6 AQUACULTURE VACCINES

6.6.1 VACCINATION PLAYS CRUCIAL ROLE IN COMMERCIAL FISH FARMING

TABLE 28 AQUACULTURE VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

#### 6.7 OTHER ANIMAL VACCINES

TABLE 29 OTHER COMPANION ANIMAL VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

## 7 VETERINARY VACCINES MARKET, BY DISEASE

### 7.1 INTRODUCTION

TABLE 30 VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

### 7.2 PORCINE DISEASES

7.2.1 PORCINE CIRCOVIRUS II TO ACCOUNT FOR LARGEST SHARE OF PORCINE VACCINES MARKET

TABLE 31 PORCINE VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 32 PORCINE DISEASES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

### 7.3 POULTRY DISEASES

7.3.1 INFECTIOUS BRONCHITIS SEGMENT TO ACCOUNT FOR LARGEST SHARE OF POULTRY VACCINES MARKET

TABLE 33 POULTRY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 34 POULTRY DISEASES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

## 7.4 LIVESTOCK DISEASES

TABLE 35 LIVESTOCK VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 36 LIVESTOCK DISEASES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

### 7.4.1 BOVINE DISEASES

7.4.1.1 Foot-and-mouth disease segment to account for largest share of bovine vaccines market

TABLE 37 BOVINE VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 38 BOVINE DISEASES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

### 7.4.2 SMALL RUMINANT DISEASES

7.4.2.1 Clostridial disease segment to account for largest share of small ruminant vaccines market

TABLE 39 SMALL RUMINANT VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 40 SMALL RUMINANT DISEASES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

## 7.5 COMPANION ANIMAL DISEASES

TABLE 41 COMPANION ANIMAL VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 42 COMPANION ANIMAL DISEASES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

### 7.5.1 CANINE DISEASES

7.5.1.1 Canine rabies segment to account for largest share of canine vaccines market

TABLE 43 CANINE VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 44 CANINE DISEASES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

### 7.5.2 FELINE DISEASES

7.5.2.1 Feline viral rhinotracheitis segment to grow at highest CAGR during forecast period

TABLE 45 FELINE VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 46 FELINE DISEASES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

## 7.6 AQUACULTURE DISEASES

7.6.1 VACCINES IN AQUACULTURE MAJORLY DEVELOPED FOR SALMONIDS, CATFISH, AND SHRIMP

TABLE 47 AQUACULTURE DISEASES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

## 8 VETERINARY VACCINES MARKET, BY TECHNOLOGY

## 8.1 INTRODUCTION

TABLE 48 VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

## 8.2 LIVE ATTENUATED VACCINES

8.2.1 LIVE ATTENUATED VACCINES SEGMENT TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD

TABLE 49 LIVE ATTENUATED VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

## 8.3 INACTIVATED VACCINES

8.3.1 RISING NEED TO DEVELOP ARTIFICIAL IMMUNITY AGAINST DISEASES FROM NON-LIVING PATHOGENS TO DRIVE GROWTH

TABLE 50 INACTIVATED VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

## 8.4 TOXOID VACCINES

8.4.1 TOXOID VACCINES USED WHEN BACTERIAL TOXINS CAUSE ILLNESS

TABLE 51 TOXOID VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

## 8.5 RECOMBINANT VACCINES

8.5.1 ADVANTAGES ASSOCIATED WITH RECOMBINANT VACCINES TO DRIVE DEMAND

TABLE 52 RECOMBINANT VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

## 8.6 OTHER VACCINES

TABLE 53 OTHER VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

# 9 VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION

## 9.1 INTRODUCTION

TABLE 54 ROUTES OF ADMINISTRATION OF MAJOR VETERINARY VACCINES

TABLE 55 VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

## 9.2 INJECTABLE VACCINES

9.2.1 INJECTABLE VACCINES SEGMENT TO DOMINATE MARKET DURING FORECAST PERIOD

TABLE 56 INJECTABLE VETERINARY VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

## 9.3 ORAL VACCINES

9.3.1 ORAL VACCINES MAKE IMMUNIZATION EASIER

TABLE 57 ORAL VETERINARY VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

## 9.4 INTRANASAL/SPRAY VACCINES

### 9.4.1 LOW COST OF INTRANASAL/SPRAY VACCINES TO SUPPORT MARKET GROWTH

TABLE 58 INTRANASAL/SPRAY VETERINARY VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

## 10 VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL

### 10.1 INTRODUCTION

TABLE 59 VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

### 10.2 VETERINARY HOSPITALS

10.2.1 VETERINARY HOSPITALS FORM LARGEST AND FASTEST-GROWING END-USER SEGMENT IN VETERINARY VACCINES MARKET

TABLE 60 US: VETERINARY VISIT EXPENSES FOR CATS AND DOGS

TABLE 61 VETERINARY VACCINES MARKET FOR VETERINARY HOSPITALS, BY COUNTRY, 2020–2027 (USD MILLION)

### 10.3 VETERINARY CLINICS

10.3.1 INCREASING NUMBER OF PRIVATE CLINICAL PRACTICES TO SUPPORT MARKET GROWTH

TABLE 62 NUMBER OF PRIVATE CLINICAL PRACTICES, BY COUNTRY, 2019 VS. 2021

TABLE 63 VETERINARY VACCINES MARKET FOR VETERINARY CLINICS, BY COUNTRY, 2020–2027 (USD MILLION)

### 10.4 RETAIL PHARMACIES

10.4.1 EASY ACCESSIBILITY TO PHARMACEUTICALS TO SUPPORT MARKET GROWTH

TABLE 64 VETERINARY VACCINES MARKET FOR RETAIL PHARMACIES, BY COUNTRY, 2020–2027 (USD MILLION)

## 11 VETERINARY VACCINES MARKET, BY REGION

### 11.1 INTRODUCTION

TABLE 65 VETERINARY VACCINES MARKET, BY REGION, 2020–2027 (USD MILLION)

### 11.2 ASIA PACIFIC

11.2.1 ASIA PACIFIC: RECESSION IMPACT

FIGURE 36 ASIA PACIFIC: VETERINARY VACCINES MARKET SNAPSHOT

TABLE 66 ASIA PACIFIC: VETERINARY VACCINES MARKET, BY COUNTRY,

2020–2027 (USD MILLION)

TABLE 67 ASIA PACIFIC: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 68 ASIA PACIFIC: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 69 ASIA PACIFIC: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 70 ASIA PACIFIC: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 71 ASIA PACIFIC: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 72 ASIA PACIFIC: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 73 ASIA PACIFIC: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 74 ASIA PACIFIC: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 75 ASIA PACIFIC: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

#### 11.2.2 CHINA

##### 11.2.2.1 China to dominate Asia Pacific veterinary vaccines market

TABLE 76 CHINA: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 77 CHINA: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 78 CHINA: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 79 CHINA: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 80 CHINA: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 81 CHINA: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 82 CHINA: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 83 CHINA: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 84 CHINA: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

### 11.2.3 JAPAN

#### 11.2.3.1 Increasing expenditure on pet healthcare to drive market growth

TABLE 85 PRODUCTION AND CONSUMPTION OF ANIMAL-DERIVED FOOD PRODUCTS IN JAPAN (2000 VS. 2030) (THOUSAND METRIC TONS)

TABLE 86 JAPAN: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 87 JAPAN: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 88 JAPAN: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 89 JAPAN: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 90 JAPAN: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 91 JAPAN: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 92 JAPAN: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 93 JAPAN: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 94 JAPAN: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

### 11.2.4 INDIA

#### 11.2.4.1 Dearth of veterinarians to restrain market growth

TABLE 95 PRODUCTION AND CONSUMPTION OF ANIMAL-DERIVED FOOD PRODUCTS IN INDIA (2000 VS. 2030) (THOUSAND METRIC TONS)

TABLE 96 INDIA: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 97 INDIA: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 98 INDIA: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 99 INDIA: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 100 INDIA: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 101 INDIA: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 102 INDIA: VETERINARY VACCINES MARKET, BY TECHNOLOGY,

2020–2027 (USD MILLION)

TABLE 103 INDIA: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 104 INDIA: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

#### 11.2.5 AUSTRALIA

11.2.5.1 Increase in pet ownership to support market growth

TABLE 105 AUSTRALIA: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 106 AUSTRALIA: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 107 AUSTRALIA: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 108 AUSTRALIA: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 109 AUSTRALIA: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 110 AUSTRALIA: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 111 AUSTRALIA: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 112 AUSTRALIA: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 113 AUSTRALIA: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

#### 11.2.6 SOUTH KOREA

11.2.6.1 Growing companion animal population to drive market growth

TABLE 114 SOUTH KOREA: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 115 SOUTH KOREA: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 116 SOUTH KOREA: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 117 SOUTH KOREA: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 118 SOUTH KOREA: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 119 SOUTH KOREA: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)



TABLE 120 SOUTH KOREA: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 121 SOUTH KOREA: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 122 SOUTH KOREA: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

#### 11.2.7 THAILAND

##### 11.2.7.1 Growth of pork and poultry industry to drive market

TABLE 123 THAILAND: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 124 THAILAND: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 125 THAILAND: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 126 THAILAND: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 127 THAILAND: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 128 THAILAND: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 129 THAILAND: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 130 THAILAND: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 131 THAILAND: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

#### 11.2.8 REST OF ASIA PACIFIC

TABLE 132 REST OF ASIA PACIFIC: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 133 REST OF ASIA PACIFIC: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 134 REST OF ASIA PACIFIC: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 135 REST OF ASIA PACIFIC: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 136 REST OF ASIA PACIFIC: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 137 REST OF ASIA PACIFIC: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 138 REST OF ASIA PACIFIC: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 139 REST OF ASIA PACIFIC: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 140 REST OF ASIA PACIFIC: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

### 11.3 NORTH AMERICA

FIGURE 37 EXPECTED GROWTH IN NUMBER OF VETERINARIANS IN NORTH AMERICA

#### 11.3.1 NORTH AMERICA: RECESSION IMPACT

FIGURE 38 NORTH AMERICA: VETERINARY VACCINES MARKET SNAPSHOT

TABLE 141 NORTH AMERICA: VETERINARY VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

TABLE 142 NORTH AMERICA: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 143 NORTH AMERICA: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 144 NORTH AMERICA: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 145 NORTH AMERICA: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 146 NORTH AMERICA: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 147 NORTH AMERICA: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 148 NORTH AMERICA: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 149 NORTH AMERICA: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 150 NORTH AMERICA: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

#### 11.3.2 US

11.3.2.1 US to dominate North American veterinary vaccines market

FIGURE 39 US: POPULATION OF DOGS, 2012–2020 (MILLION)

FIGURE 40 US: EXPENDITURE ON VET VISITS

TABLE 151 HEALTHCARE EXPENDITURE ON COMPANION ANIMALS, 2018 VS. 2020

FIGURE 41 INCOME OF VETERINARIANS IN US, 2017–2021

FIGURE 42 NUMBER OF VETERINARIANS IN US, 2016–2020

TABLE 152 US: NUMBER OF VETERINARIANS IN PRIVATE CLINICAL PRACTICES, 2014–2020

TABLE 153 US: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 154 US: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 155 US: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 156 US: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 157 US: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 158 US: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 159 US: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 160 US: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 161 US: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

### 11.3.3 CANADA

11.3.3.1 Rising pet and livestock populations to support market growth

FIGURE 43 CANADA: COMPANION ANIMAL POPULATION, 2016–2020 (MILLION)

TABLE 162 CANADA: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 163 CANADA: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 164 CANADA: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 165 CANADA: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 166 CANADA: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 167 CANADA: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 168 CANADA: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 169 CANADA: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 170 CANADA: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

#### 11.4 EUROPE

##### 11.4.1 EUROPE: RECESSION IMPACT

TABLE 171 EUROPE: VETERINARY VACCINES MARKET, BY COUNTRY, 2020–2027 (USD MILLION)

TABLE 172 EUROPE: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 173 EUROPE: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 174 EUROPE: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 175 EUROPE: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 176 EUROPE: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 177 EUROPE: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 178 EUROPE: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 179 EUROPE: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 180 EUROPE: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

##### 11.4.2 GERMANY

##### 11.4.2.1 Germany to dominate European veterinary vaccines market

TABLE 181 GERMANY: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 182 GERMANY: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 183 GERMANY: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 184 GERMANY: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 185 GERMANY: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 186 GERMANY: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 187 GERMANY: VETERINARY VACCINES MARKET, BY TECHNOLOGY,

2020–2027 (USD MILLION)

TABLE 188 GERMANY: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 189 GERMANY: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

#### 11.4.3 UK

11.4.3.1 Growing pet adoption to drive demand for veterinary vaccines

TABLE 190 UK: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 191 UK: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 192 UK: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 193 UK: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 194 UK: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 195 UK: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 196 UK: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 197 UK: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 198 UK: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

#### 11.4.4 FRANCE

11.4.4.1 Rising pet ownership to support market growth

TABLE 199 FRANCE: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 200 FRANCE: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 201 FRANCE: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 202 FRANCE: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 203 FRANCE: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 204 FRANCE: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 205 FRANCE: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 206 FRANCE: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 207 FRANCE: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

#### 11.4.5 ITALY

11.4.5.1 Increasing outbreaks of diseases to support market growth

TABLE 208 ITALY: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 209 ITALY: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 210 ITALY: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 211 ITALY: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 212 ITALY: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 213 ITALY: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 214 ITALY: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 215 ITALY: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 216 ITALY: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

#### 11.4.6 SPAIN

11.4.6.1 Increase in number of veterinary practices to drive market growth

TABLE 217 SPAIN: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 218 SPAIN: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 219 SPAIN: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 220 SPAIN: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 221 SPAIN: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 222 SPAIN: COMPANION ANIMAL DISEASES MARKET, BY TYPE,



2020–2027 (USD MILLION)

TABLE 223 SPAIN: VETERINARY VACCINES MARKET, BY TECHNOLOGY,  
2020–2027 (USD MILLION)

TABLE 224 SPAIN: VETERINARY VACCINES MARKET, BY ROUTE OF  
ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 225 SPAIN: VETERINARY VACCINES MARKET, BY DISTRIBUTION  
CHANNEL, 2020–2027 (USD MILLION)

#### 11.4.7 REST OF EUROPE

TABLE 226 REST OF EUROPE: VETERINARY VACCINES MARKET, BY TYPE,  
2020–2027 (USD MILLION)

TABLE 227 REST OF EUROPE: LIVESTOCK VACCINES MARKET, BY TYPE,  
2020–2027 (USD MILLION)

TABLE 228 REST OF EUROPE: COMPANION ANIMAL VACCINES MARKET, BY  
TYPE, 2020–2027 (USD MILLION)

TABLE 229 REST OF EUROPE: VETERINARY VACCINES MARKET, BY DISEASE,  
2020–2027 (USD MILLION)

TABLE 230 REST OF EUROPE: LIVESTOCK DISEASES MARKET, BY TYPE,  
2020–2027 (USD MILLION)

TABLE 231 REST OF EUROPE: COMPANION ANIMAL DISEASES MARKET, BY  
TYPE, 2020–2027 (USD MILLION)

TABLE 232 REST OF EUROPE: VETERINARY VACCINES MARKET, BY  
TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 233 REST OF EUROPE: VETERINARY VACCINES MARKET, BY ROUTE OF  
ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 234 REST OF EUROPE: VETERINARY VACCINES MARKET, BY  
DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

#### 11.5 LATIN AMERICA

##### 11.5.1 LATIN AMERICA: RECESSION IMPACT

TABLE 235 LATIN AMERICA: VETERINARY VACCINES MARKET, BY COUNTRY,  
2020–2027 (USD MILLION)

TABLE 236 LATIN AMERICA: VETERINARY VACCINES MARKET, BY TYPE,  
2020–2027 (USD MILLION)

TABLE 237 LATIN AMERICA: LIVESTOCK VACCINES MARKET, BY TYPE,  
2020–2027 (USD MILLION)

TABLE 238 LATIN AMERICA: COMPANION ANIMAL VACCINES MARKET, BY TYPE,  
2020–2027 (USD MILLION)

TABLE 239 LATIN AMERICA: VETERINARY VACCINES MARKET, BY DISEASE,  
2020–2027 (USD MILLION)

TABLE 240 LATIN AMERICA: LIVESTOCK DISEASES MARKET, BY TYPE,



2020–2027 (USD MILLION)

TABLE 241 LATIN AMERICA: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 242 LATIN AMERICA: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 243 LATIN AMERICA: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 244 LATIN AMERICA: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

#### 11.5.2 BRAZIL

11.5.2.1 Well-established and rapidly growing livestock industry to promote growth

TABLE 245 BRAZIL: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 246 BRAZIL: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 247 BRAZIL: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 248 BRAZIL: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 249 BRAZIL: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 250 BRAZIL: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 251 BRAZIL: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 252 BRAZIL: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 253 BRAZIL: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

#### 11.5.3 MEXICO

11.5.3.1 Mexico to continue to be second-largest pet care market in Latin America during forecast period

TABLE 254 MEXICO: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 255 MEXICO: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 256 MEXICO: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 257 MEXICO: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027

(USD MILLION)

TABLE 258 MEXICO: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 259 MEXICO: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 260 MEXICO: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 261 MEXICO: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 262 MEXICO: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

#### 11.5.4 REST OF LATIN AMERICA

TABLE 263 REST OF LATIN AMERICA: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 264 REST OF LATIN AMERICA: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 265 REST OF LATIN AMERICA: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 266 REST OF LATIN AMERICA: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 267 REST OF LATIN AMERICA: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 268 REST OF LATIN AMERICA: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 269 REST OF LATIN AMERICA: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 270 REST OF LATIN AMERICA: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 271 REST OF LATIN AMERICA: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

#### 11.6 MIDDLE EAST & AFRICA

11.6.1 LOW PORK PRODUCTION AND CONSUMPTION IN MIDDLE EASTERN COUNTRIES DUE TO RELIGIOUS CUSTOMS TO LIMIT GROWTH

TABLE 272 MIDDLE EAST & AFRICA: VETERINARY VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 273 MIDDLE EAST & AFRICA: LIVESTOCK VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 274 MIDDLE EAST & AFRICA: COMPANION ANIMAL VACCINES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 275 MIDDLE EAST & AFRICA: VETERINARY VACCINES MARKET, BY DISEASE, 2020–2027 (USD MILLION)

TABLE 276 MIDDLE EAST & AFRICA: LIVESTOCK DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 277 MIDDLE EAST & AFRICA: COMPANION ANIMAL DISEASES MARKET, BY TYPE, 2020–2027 (USD MILLION)

TABLE 278 MIDDLE EAST & AFRICA: VETERINARY VACCINES MARKET, BY TECHNOLOGY, 2020–2027 (USD MILLION)

TABLE 279 MIDDLE EAST & AFRICA: VETERINARY VACCINES MARKET, BY ROUTE OF ADMINISTRATION, 2020–2027 (USD MILLION)

TABLE 280 MIDDLE EAST & AFRICA: VETERINARY VACCINES MARKET, BY DISTRIBUTION CHANNEL, 2020–2027 (USD MILLION)

## **12 COMPETITIVE LANDSCAPE**

### 12.1 OVERVIEW

#### 12.2 STRATEGIES ADOPTED BY KEY PLAYERS (JANUARY 2019 TO MARCH 2023)

##### FIGURE 44 KEY PLAYER STRATEGIES

#### 12.3 REVENUE SHARE ANALYSIS OF TOP 5 PLAYERS

##### FIGURE 45 VETERINARY VACCINES MARKET: REVENUE SHARE ANALYSIS OF TOP PLAYERS (2017–2021)

#### 12.4 MARKET SHARE ANALYSIS

##### FIGURE 46 VETERINARY VACCINES MARKET SHARE, BY KEY PLAYER (2021)

#### 12.5 COMPANY FOOTPRINT

##### TABLE 281 VETERINARY VACCINES MARKET: BY TYPE

##### TABLE 282 VETERINARY VACCINES MARKET: BY DISEASE

##### TABLE 283 VETERINARY VACCINES MARKET: BY TECHNOLOGY

##### TABLE 284 VETERINARY VACCINES MARKET: BY ROUTE OF ADMINISTRATION

##### TABLE 285 VETERINARY VACCINES MARKET: BY DISTRIBUTION CHANNEL

#### 12.6 COMPANY GEOGRAPHIC FOOTPRINT

##### TABLE 286 VETERINARY VACCINES MARKET: REGIONAL REVENUE MIX

#### 12.7 COMPANY EVALUATION QUADRANT

##### 12.7.1 STARS

##### 12.7.2 EMERGING LEADERS

##### 12.7.3 PERVASIVE PLAYERS

##### 12.7.4 PARTICIPANTS

##### FIGURE 47 VETERINARY VACCINES MARKET: COMPANY EVALUATION QUADRANT (2021)

#### 12.8 STARTUPS/SMES EVALUATION QUADRANT

12.8.1 PROGRESSIVE COMPANIES

12.8.2 DYNAMIC COMPANIES

12.8.3 STARTING BLOCKS

12.8.4 RESPONSIVE COMPANIES

FIGURE 48 VETERINARY VACCINES MARKET: EVALUATION QUADRANT FOR STARTUPS/SMES (2021)

12.9 COMPETITIVE BENCHMARKING

TABLE 287 VETERINARY VACCINES MARKET: DETAILED LIST OF KEY STARTUPS/SMES

12.10 COMPETITIVE SITUATION AND TRENDS

12.10.1 PRODUCT LAUNCHES & APPROVALS

TABLE 288 PRODUCT LAUNCHES & APPROVALS

12.10.2 DEALS

TABLE 289 DEALS

12.10.3 OTHER DEVELOPMENTS

TABLE 290 OTHER DEVELOPMENTS

## **13 COMPANY PROFILES**

(Business overview, Products offered, Recent developments & MnM View)\*

13.1 KEY PLAYERS

13.1.1 ZOETIS, INC.

TABLE 291 ZOETIS, INC.: BUSINESS OVERVIEW

FIGURE 49 ZOETIS, INC.: COMPANY SNAPSHOT (2022)

13.1.2 MERCK & CO., INC.

TABLE 292 MERCK & CO., INC.: BUSINESS OVERVIEW

FIGURE 50 MERCK & CO., INC.: COMPANY SNAPSHOT (2021)

13.1.3 BOEHRINGER INGELHEIM INTERNATIONAL GMBH

TABLE 293 BOEHRINGER INGELHEIM INTERNATIONAL GMBH: BUSINESS OVERVIEW

FIGURE 51 BOEHRINGER INGELHEIM INTERNATIONAL GMBH: COMPANY SNAPSHOT (2021)

13.1.4 ELANCO ANIMAL HEALTH

TABLE 294 ELANCO ANIMAL HEALTH: BUSINESS OVERVIEW

FIGURE 52 ELANCO ANIMAL HEALTH: COMPANY SNAPSHOT (2021)

13.1.5 VIRBAC

TABLE 295 VIRBAC: BUSINESS OVERVIEW

FIGURE 53 VIRBAC: COMPANY SNAPSHOT (2021)

13.1.6 CEVA SANT' ANIMALE

TABLE 296 CEVA SANT? ANIMALE: BUSINESS OVERVIEW

13.1.7 PHIBRO ANIMAL HEALTH CORPORATION

TABLE 297 PHIBRO ANIMAL HEALTH: BUSINESS OVERVIEW

FIGURE 54 PHIBRO ANIMAL HEALTH: COMPANY SNAPSHOT (2021)

13.1.8 HESTER BIOSCIENCES LIMITED

TABLE 298 HESTER BIOSCIENCES: BUSINESS OVERVIEW

FIGURE 55 HESTER BIOSCIENCES: COMPANY SNAPSHOT (2021)

13.1.9 NEOGEN CORPORATION

TABLE 299 NEOGEN CORPORATION: BUSINESS OVERVIEW

FIGURE 56 NEOGEN CORPORATION: COMPANY SNAPSHOT (2022)

13.1.10 HIPRA

TABLE 300 HIPRA: BUSINESS OVERVIEW

13.1.11 BIOG?NESIS BAG?

TABLE 301 BIOG?NESIS BAG?: BUSINESS OVERVIEW

13.1.12 TIANJIN RINGPU BIOTECHNOLOGY CO. LTD.

TABLE 302 TIANJIN RINGPU BIOTECHNOLOGY CO LTD: BUSINESS OVERVIEW

13.1.13 CHINA ANIMAL HUSBANDRY GROUP

TABLE 303 CHINA ANIMAL HUSBANDRY GROUP: BUSINESS OVERVIEW

13.1.14 JINYU BIO-TECHNOLOGY

TABLE 304 JINYU BIO-TECHNOLOGY: BUSINESS OVERVIEW

13.1.15 VAXXINOVA INTERNATIONAL BV

TABLE 305 VAXXINOVA INTERNATIONAL BV: BUSINESS OVERVIEW

\*Details on Business overview, Products offered, Recent developments & MnM View might not be captured in case of unlisted companies.

## 13.2 OTHER COMPANIES

13.2.1 ENDOVAC ANIMAL HEALTH

13.2.2 BRILLIANT BIO PHARMA

13.2.3 APTIMMUNE

13.2.4 INDIAN IMMUNOLOGICALS LTD.

13.2.5 TORIGEN PHARMACEUTICALS, INC.

13.2.6 VEROVACCINES GMBH

13.2.7 INTAS PHARMACEUTICALS

13.2.8 OUROFINO ANIMAL HEALTH

13.2.9 BIOVAC

13.2.10 LABORATOIRE LCV

## 14 APPENDIX

### 14.1 DISCUSSION GUIDE

14.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

14.3 CUSTOMIZATION OPTIONS

14.4 RELATED REPORTS

14.5 AUTHOR DETAILS

## I would like to order

Product name: Veterinary Vaccines Market by Type (Porcine, Poultry, Livestock, Companion Animals), Technology (Live Attenuated, Inactivated, Toxoid), Route of Administration (Injection, Intranasal), Distribution Channel (Hospitals, Clinics) - Global Forecast to 2027

Product link: <https://marketpublishers.com/r/AF1F003A9FDEN.html>

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

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/AF1F003A9FDEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below



and fax the completed form to +44 20 7900 3970