

Animal/Veterinary Vaccines Market [Products (Livestock - Bovine, Companion - Canine, Poultry, Equine), Diseases (Rabies, Distemper, Foot & Mouth, Gumboro, Avian Influenza, Strangles), Technology (Live attenuated, DNA, Recombinant)] – Global Forecast to 2018

<https://marketpublishers.com/r/A6DA4503F8AEN.html>

Date: September 2013

Pages: 278

Price: US\$ 5,650.00 (Single User License)

ID: A6DA4503F8AEN

Abstracts

The global animal vaccines market is in its growth phase and is estimated to be worth \$5.8 billion in 2013. It is expected to grow at a healthy CAGR of 8.1% to reach \$8.6 billion by 2018. The animal vaccines market is segmented on the basis of products, animal diseases, and technologies that are involved in developing vaccines for veterinary administration. The global animal vaccines market, by products, is further segmented into seven segments, namely, companion animal vaccines, livestock, poultry, porcine, equine, aquaculture, and other animal vaccines. In 2012, livestock vaccines and porcine vaccines were two of the largest segments, which accounted for 63% of the market share, globally. The livestock vaccines market is further segmented into bovine vaccines and small ruminant vaccines, whereas the companion animal vaccines market is further segmented into canine vaccines and feline vaccines.

By technology, the animal vaccines market is segmented on the basis of live attenuated vaccines, inactivated vaccines, subunit vaccines, toxoid vaccines, conjugate vaccines, recombinant vaccines, and DNA vaccines. DNA vaccines demonstrate tremendous growth opportunities due to factors such as added thermo-stability, cost effectiveness, easy production, and rapid development against emerging diseases.

The factors responsible for the growth of the animal vaccine market include increasing incidences of zoonotic diseases in humans, growing prevalence of animal diseases, and

increasing investments by government bodies, animal welfare associations, and leading players. Another factor that drives the growth in this space is the continuous innovations and introduction of new products in the market. Since 2012, more than 20 new products have been launched, presenting a huge potential for growth in this arena. However, increasing maintenance costs for vaccines and the shift towards vegetarian food by consumers will restrict the growth of the market to a certain extent. With the growing awareness of animal health in emerging economies, new entrants as well as established players have huge opportunities to introduce novel vaccines such as DNA and recombinant vaccines and to enter emerging countries.

Europe accounts for the largest share of the animal vaccines market, followed by North America. Both markets are reaching the maturity phase of their growth process, and will register mid single-digit growth rates for the next five years. The developing regions that include Asia, parts of Africa, and LATAM are expected to form the new revenue pockets for this market. These regions are poised to double their growth rates owing to the increasing investment opportunities for companies in these immature markets and the improving healthcare facilities for animals. Countries such as China, India, Australia, and Brazil will be major contributors to the growth of the market.

To encash the favorable conditions in developing economies and to stay ahead of the competition in the global market, a number of tier-I companies are investing in these countries. For instance, in April 2013, Lohmann Animal Health invested about \$100 million to set up a poultry vaccine manufacturing plant in Taiwan.

Owing to high growth prospects in the aquaculture, companion, and equine vaccine which are estimated to double their growth rates during the forecast period, will observe huge investments in these segments from major players. For example in late 2011, Pfizer Animal Health invested \$75 million to open an R&D centre in the U.S.

The market is dominated by tier I players and is fairly consolidated with the top five players contributing close to 70% of the share. New entrants face high barriers in entering this market as it is a capital-intensive industry with strict regulations. The major players in the global animal vaccines market are Pfizer (Zoetis) (U.S.), Merck (U.S.), Sanofi-Aventis (France), Bayer HealthCare (Germany), Virbac (France), Novartis (Switzerland), Boehringer Ingelheim (Germany), Heska Corporation (U.S.), Bioniche Animal Health Canada Inc. (Canada), and Ceva (France).

New product launches, agreements, partnerships, collaborations, along with joint ventures are the two most preferred strategies, followed by the key players. The

industry giants adopted these strategies to enhance their product offerings, to increase their market shares, to meet the customer need, and to consolidate their market presence. In addition, companies such as Heska Corporation, Bayer Healthcare, and Merial Animal Health, focus on mergers & acquisition to gain an edge in the competition. For instance, in December 2012, Merial (Animal health division of Sanofi) acquired the animal health division of Dosch Pharmaceuticals Pvt. Ltd., to enter the emerging Indian Animal Health market.

Contents

1 INTRODUCTION

- 1.1 KEY TAKE-AWAYS
- 1.2 REPORT DESCRIPTION
- 1.3 RESEARCH METHODOLOGY
 - 1.3.1 MARKET SIZE ESTIMATION
 - 1.3.2 MARKET SHARE
 - 1.3.3 KEY DATA POINTS FROM SECONDARY SOURCES
 - 1.3.4 KEY DATA POINTS FROM PRIMARY SOURCES
 - 1.3.5 ASSUMPTIONS
- 1.4 MARKETS COVERED
- 1.5 STAKEHOLDERS
- 1.6 MARKET SCOPE

2 EXECUTIVE SUMMARY

3 MARKET OVERVIEW

- 3.1 INTRODUCTION
- 3.2 MARKET SEGMENTATION
- 3.3 MARKET DYNAMICS
 - 3.3.1 DRIVERS
 - 3.3.1.1 Growing Prevalence of Animal Diseases will Result in Employing Preventive Measures Like Vaccines
 - 3.3.1.2 Increasing Incidences of Zoonotic Diseases in Humans will Propel the Vaccines Market
 - 3.3.1.3 Increasing Investments by Various Government Agencies, Animal Associations, & Leading Players to Propel the Market
 - 3.3.1.4 Continuous Innovations & Introduction of New Products Propels the Market
 - 3.3.2 RESTRAINTS
 - 3.3.2.1 Rising Maintenance Costs for Storage of Vaccines, a Burden on Manufacturers & Distributors
 - 3.3.2.2 Increasing Adoption of Vegetarian Food in Major Economies Owing to Increasing Risk of Obesity and other Chronic Disorders
 - 3.3.2.3 Persistent Economic Slowdown to Affect Growth
 - 3.3.3 OPPORTUNITIES
 - 3.3.3.1 Technological Innovations like DNA Vaccines

3.3.3.2 Growing Awareness of Animal Health in Emerging Economies

3.3.3.3 Increasing Investment Opportunities in Emerging and Immature Markets

3.4 REGULATIONS FOR ANIMAL VACCINES

3.4.1 USDA REGULATES THE REGISTRATION PROCESS IN U.S.

3.4.2 EMEA IS THE APEX BODY FOR APPROVAL OF VETERINARY VACCINES IN EUROPE

3.4.3 MAFF REGULATES THE VETERINARY MEDICINAL PRODUCTS (VMPS) IN JAPAN

3.4.4 VICH HARMONIZES THE REGISTRATION PROCESS IN U.S., EUROPE AND JAPAN

3.5 PORTER'S FIVE FORCES ANALYSIS

3.5.1 THREAT FROM NEW ENTRANTS

3.5.2 THREAT FROM SUBSTITUTES

3.5.3 BARGAINING POWER OF BUYERS

3.5.4 BARGAINING POWER OF SUPPLIERS

3.5.5 COMPETITIVE RIVALRY AMONG EXISTING PLAYERS

3.6 MARKET SHARE ANALYSIS

3.6.1 GLOBAL

3.6.2 NORTH AMERICA

3.6.3 EUROPE

3.6.4 ASIA

4 GLOBAL ANIMAL VACCINES MARKET, BY PRODUCT

4.1 INTRODUCTION

4.2 COMPANION ANIMAL VACCINES

4.2.1 CANINE VACCINES CONTRIBUTE THE LARGEST TO THE COMPANION ANIMAL VACCINES MARKET

4.2.2 CANINE VACCINES

4.2.3 FELINE VACCINES

4.3 LIVESTOCK VACCINES

4.3.1 INCREASING INVESTMENTS BY GOVERNMENT BODIES AND COMPANIES

4.3.2 BOVINE VACCINES

4.3.3 SMALL RUMINANT VACCINES

4.4 POULTRY VACCINES

4.5 PORCINE VACCINES

4.6 EQUINE VACCINES

4.7 AQUACULTURE VACCINES

4.7.1 AQUACULTURE VACCINES MARKET TO GROW AT THE FASTEST PACE

4.8 OTHER ANIMAL VACCINES

5 GLOBAL ANIMAL VACCINES MARKET, BY DISEASE

5.1 INTRODUCTION

5.2 COMPANION ANIMAL VACCINES

5.2.1 CANINE VACCINES, BY DISEASE

5.2.1.1 Canine Rabies

5.2.1.2 Canine Distemper

5.2.1.3 Canine Parvovirus

5.2.1.4 Infectious Canine Hepatitis

5.2.2 FELINE VACCINES, BY DISEASE

5.2.2.1 Feline Rabies

5.2.2.2 Feline Panleukopenia

5.2.2.3 Feline Viral Rhinotracheitis

5.2.2.4 Feline Leukemia

5.3 LIVESTOCK VACCINES

5.3.1 BOVINE VACCINES, BY DISEASE

5.3.1.1 Foot and Mouth Disease (FMD)

5.3.1.2 Bovine Viral Diarrhea

5.3.1.3 Bovine Clostridial Diseases

5.3.1.4 Brucellosis

5.3.1.5 Infectious Bovine Rhinotracheitis

5.3.2 SMALL RUMINANT VACCINES, BY DISEASE

5.3.2.1 Small Ruminant Clostridial Diseases

5.3.2.2 Scabby Mouth Infection

5.3.2.3 Pneumonia & Septicemia

5.3.2.4 Pox Diseases

5.3.2.5 Ovine Johne's Disease (Paratuberculosis)

5.4 POULTRY VACCINES, BY DISEASE

5.4.1 INFECTIOUS BRONCHITIS

5.4.2 GUMBORO DISEASE

5.4.3 AVIAN INFLUENZA

5.4.4 COCCIDIOSIS

5.4.5 MAREK'S DISEASE

5.4.6 NEWCASTLE DISEASE

5.5 PORCINE VACCINES, BY DISEASE

5.5.1 PORCINE PARVOVIRUS

5.5.2 PORCINE REPRODUCTIVE RESPIRATORY SYNDROME (PRRS)

- 5.5.3 PORCINE CIRCOVIRUS II
- 5.5.4 SWINE INFLUENZA
- 5.5.5 SWINE PNEUMONIA
- 5.6 EQUINE VACCINES, BY DISEASE
 - 5.6.1 EQUINE ENCEPHALOMYELITIS
 - 5.6.2 STRANGLES
 - 5.6.3 EQUINE INFLUENZA (HORSE FLU)
 - 5.6.4 EQUINE RHINOPNEUMONITIS
- 5.7 AQUACULTURE VACCINES, BY DISEASE
 - 5.7.1 VIBRIOSIS
 - 5.7.2 PASTEURELLOSIS
 - 5.7.3 FURUNCULOSIS

6 ANIMAL VACCINE MARKET, BY TECHNOLOGY

- 6.1 INTRODUCTION
- 6.2 LIVE ATTENUATED VACCINES (LAV)
- 6.3 INACTIVATED VACCINES
- 6.4 SUBUNIT VACCINES
- 6.5 TOXOID VACCINES
- 6.6 CONJUGATE VACCINES
- 6.7 RECOMBINANT VACCINES
- 6.8 DNA VACCINES
- 6.9 LIVE ATTENUATED TECHNOLOGY CONTRIBUTES THE LARGEST TO THE LIVESTOCK VACCINES MARKET
- 6.10 DNA VACCINES ALONG WITH INACTIVATED & RECOMBINANT TECHNOLOGY TO GROW AT HEALTHY PACE
- 6.11 INACTIVATED VACCINES TECHNOLOGY ACCOUNTS FOR THE LARGEST SHARE IN PORCINE VACCINE MARKET

7 GEOGRAPHIC ANALYSIS

- 7.1 INTRODUCTION
- 7.2 EUROPE
 - 7.2.1 EUROPE DOMINATES THE ANIMAL VACCINE MARKET OWING TO HIGHLY ORGANIZED LIVESTOCK SECTOR
- 7.3 NORTH AMERICA
 - 7.3.1 RISE IN COMPANION & FARM ANIMALS TO DRIVE THE NORTH AMERICAN MARKET

7.3.2 INCREASE IN INVESTMENTS BY COMPANIES IN NORTH AMERICA

7.4 ASIA

7.4.1 ASIAN COUNTRIES OFFER HUGE OPPORTUNITIES TO VACCINE MANUFACTURERS

7.5 REST OF THE WORLD (ROW)

8 COMPETITIVE LANDSCAPE

8.1 INTRODUCTION

8.1.1 MORE THAN 20 NEW PRODUCTS WERE LAUNCHED BETWEEN 2012 & 2013

8.2 MERGERS & ACQUISITIONS

8.3 AGREEMENTS, PARTNERSHIPS, COLLABORATIONS, & JOINT VENTURES

8.4 NEW PRODUCT LAUNCH

8.5 OTHER DEVELOPMENTS

9 COMPANY PROFILES (OVERVIEW, FINANCIALS, PRODUCTS & SERVICES, STRATEGY, & DEVELOPMENTS)

9.1 BAYER HEALTHCARE

9.2 BIOGENESIS BAGO S.A.

9.3 BIONICHE ANIMAL HEALTH CANADA, INC.

9.4 BOEHRINGER INGELHEIM

9.5 CEVA (CEVA SANTE ANIMALE)

9.6 HESKA CORPORATION

9.7 INDIAN IMMUNOLOGICALS LTD.

9.8 LOHMANN ANIMAL HEALTH INTERNATIONAL

9.9 MERCK

9.10 MERIAL (ANIMAL HEALTH DIVISION OF SANOFI)

9.11 NOVARTIS ANIMAL HEALTH, INC.

9.12 PROTEIN SCIENCES CORPORATION

9.13 VIRBAC

9.14 ZOETIS (PFIZER ANIMAL HEALTH) (Details on Financials, Product & Services, Strategy, & Developments might not be captured in case of unlisted companies.)

List Of Tables

LIST OF TABLES

TABLE 1 GLOBAL VETERINARY VACCINES MARKET, BY PRODUCT, 2011 – 2018 (\$MILLION)

TABLE 2 GLOBAL COMPANION ANIMAL VACCINES MARKET, BY CATEGORY, 2011 - 2018 (\$MILLION)

TABLE 3 COMPANION ANIMAL VACCINES MARKET, BY GEOGRAPHY, 2011 - 2018 (\$MILLION)

TABLE 4 GLOBAL LIVESTOCK VACCINES MARKET, BY CATEGORY, 2011 - 2018 (\$MILLION)

TABLE 5 LIVESTOCK VACCINES MARKET, BY GEOGRAPHY, 2011 - 2018 (\$MILLION)

TABLE 6 POULTRY VACCINES MARKET, BY GEOGRAPHY, 2011 - 2018 (\$MILLION)

TABLE 7 PORCINE VACCINES MARKET, BY GEOGRAPHY, 2011 - 2018 (\$MILLION)

TABLE 8 EQUINE VACCINES MARKET, BY GEOGRAPHY, 2011 - 2018 (\$MILLION)

TABLE 9 AQUACULTURE VACCINES MARKET, BY GEOGRAPHY, 2011 - 2018 (\$MILLION)

TABLE 10 OTHER VACCINES MARKET, BY GEOGRAPHY, 2011 – 2018 (\$MILLION)

TABLE 11 GLOBAL CANINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 12 GLOBAL FELINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 13 GLOBAL BOVINE VACCINES MARKET, BY DISEASE, 2011 –2018 (\$MILLION)

TABLE 14 GLOBAL SMALL RUMINANT VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 15 GLOBAL POULTRY VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 16 COMMERCIALY USED STRAIN FOR AVIAN INFLUENZA VACCINES

TABLE 17 COMMERCIALY USED STRAIN FOR NEWCASTLE DISEASE VACCINES

TABLE 18 GLOBAL PORCINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 19 GLOBAL EQUINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 20 GLOBAL AQUACULTURE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 21 GLOBAL COMPANION ANIMAL VACCINE MARKET, BY TECHNOLOGY,

2011 – 2018 (\$MILLION)

TABLE 22 GLOBAL LIVESTOCK VACCINE MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 23 GLOBAL POULTRY VACCINE MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 24 GLOBAL PORCINE VACCINE MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 25 GLOBAL EQUINE VACCINE MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 26 GLOBAL AQUACULTURE VACCINE MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 27 NUMBER OF CATTLE IN EUROPE, 2010 & 2011 (THOUSAND HEAD)

TABLE 28 EUROPE: VETERINARY VACCINES MARKET, BY PRODUCT, 2011 – 2018 (\$MILLION)

TABLE 29 EUROPE: COMPANION ANIMAL VACCINES MARKET, BY CATEGORY, 2011 – 2018 (\$MILLION)

TABLE 30 EUROPE: CANINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 31 EUROPE: FELINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 32 EUROPE: COMPANION ANIMAL VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 33 EUROPE: LIVESTOCK VACCINES MARKET, BY CATEGORY, 2011 – 2018 (\$MILLION)

TABLE 34 EUROPE: BOVINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 35 EUROPE: SMALL RUMINANT VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 36 EUROPE: LIVESTOCK VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 37 EUROPE: POULTRY VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 38 EUROPE: POULTRY VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 39 EUROPE: PORCINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 40 EUROPE: PORCINE VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 41 EUROPE: EQUINE VACCINES MARKET, BY DISEASE, 2011 – 2018

(\$MILLION)

TABLE 42 EUROPE: EQUINE VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 43 EUROPE: AQUACULTURE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 44 EUROPE: AQUACULTURE VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 45 NORTH AMERICA: VETERINARY VACCINES MARKET, BY PRODUCT, 2011 – 2018 (\$MILLION)

TABLE 46 NORTH AMERICA: COMPANION ANIMAL VACCINES MARKET, BY CATEGORY, 2011 – 2018

TABLE 47 NORTH AMERICA: CANINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 48 NORTH AMERICA: FELINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 49 NORTH AMERICA: COMPANION ANIMAL VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 50 NORTH AMERICA: LIVESTOCK VACCINES MARKET, BY CATEGORY, 2011 – 2018 (\$MILLION)

TABLE 51 NORTH AMERICA: BOVINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 52 NORTH AMERICA: SMALL RUMINANT VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 53 NORTH AMERICA: LIVESTOCK VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 54 NORTH AMERICA: POULTRY VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 55 NORTH AMERICA: POULTRY VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 56 NORTH AMERICA: PORCINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 57 NORTH AMERICA: PORCINE VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 58 NORTH AMERICA: EQUINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 59 NORTH AMERICA: EQUINE VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 60 NORTH AMERICA: AQUACULTURE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 61 NORTH AMERICA: AQUACULTURE VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 62 ASIA: VETERINARY VACCINES MARKET, BY PRODUCT, 2011 – 2018 (\$MILLION)

TABLE 63 ASIA: COMPANION ANIMAL VACCINES MARKET, BY CATEGORY, 2011 – 2018 (\$MILLION)

TABLE 64 ASIA: CANINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 65 ASIA: FELINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 66 ASIA: COMPANION ANIMAL VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 67 ASIA: LIVESTOCK VACCINES MARKET, BY CATEGORY, 2011 – 2018 (\$MILLION)

TABLE 68 ASIA: BOVINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 69 ASIA: SMALL RUMINANT VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 70 ASIA: LIVESTOCK VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 71 ASIA: POULTRY VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 72 ASIA: POULTRY VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 73 ASIA: PORCINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 74 ASIA: PORCINE VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 75 ASIA: EQUINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 76 ASIA: EQUINE VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 77 ASIA: AQUACULTURE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 78 ASIA: AQUACULTURE VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 79 ROW: VETERINARY VACCINES MARKET, BY PRODUCT, 2011 – 2018 (\$BILLION)

TABLE 80 ROW: COMPANION ANIMAL VACCINES MARKET, BY CATEGORY, 2011 – 2018 (\$MILLION)

TABLE 81 ROW: CANINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 82 ROW: FELINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 83 ROW: COMPANION ANIMAL VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 84 ROW: LIVESTOCK VACCINES MARKET, BY CATEGORY, 2011 – 2018 (\$MILLION)

TABLE 85 ROW: BOVINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 86 ROW: SMALL RUMINANT VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 87 ROW: LIVESTOCK VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 88 ROW: POULTRY VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 89 ROW: POULTRY VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 90 ROW: PORCINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 91 ROW: PORCINE VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 92 ROW: EQUINE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 93 ROW: EQUINE VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 94 ROW: AQUACULTURE VACCINES MARKET, BY DISEASE, 2011 – 2018 (\$MILLION)

TABLE 95 ROW: AQUACULTURE VACCINES MARKET, BY TECHNOLOGY, 2011 – 2018 (\$MILLION)

TABLE 96 MERGERS & ACQUISITIONS (2011 – 2013)

TABLE 97 AGREEMENTS, PARTNERSHIPS, COLLABORATIONS, & JOINT VENTURES (2011 – 2013)

TABLE 98 NEW PRODUCT LAUNCH (2011 – 2013)

TABLE 99 OTHER DEVELOPMENTS (2011 – 2012)

List Of Figures

LIST OF FIGURES

Figure 1 Market Size Estimation Methodology For Animal Vaccines Market, By Products

Figure 2 Market Size Estimation Methodology For Animal Vaccines Market, By Diseases And Technology

Figure 3 Data Triangulation Methodology (360o Evaluation)

Figure 4 Veterinary Vaccines Market, By Geography (%) & By Products (\$Million), 2013

Figure 5 Animal Vaccines Market Segmentation

Figure 6 Market Dynamics

Figure 7 Porter's Five Forces Analysis

Figure 8 Global Market Share Analysis, By Key Players, 2012

Figure 9 North America: Animal Vaccines Market Share Analysis, By Key Players, 2012

Figure 10 Europe: Animal Vaccines Market Share Analysis, By Key Players, 2012

Figure 11 Asia: Animal Vaccines Market Share Analysis, By Key Players, 2012

Figure 12 Opportunity Matrix: Global Veterinary Vaccines Market, By Product, 2011 - 2018 (\$Million)

Figure 13 Global Canine Vaccines Market, By Disease, 2013 (\$Million)

Figure 14 Global Feline Vaccines Market, By Disease, 2013 (\$Million)

Figure 15 Technology Evolution

Figure 16 Global LAV Market, By Product, 2013 & 2018 (\$Million)

Figure 17 Animal Vaccines Market, By Geography, 2013

Figure 18 Animal Vaccines Market, Growth Phases, By Geography, 2013

Figure 19 Geographic Reach Vs Product Portfolio Analysis: Key Players

Figure 20 Key Growth Strategies, 2010 – 2013

Figure 21 Bayer Healthcare: Total Revenue (\$Million) And Operating Margin (%), 2010 – 2012

Figure 22 Bayer Healthcare: Business Revenue Mix, 2012

Figure 23 Bayer Healthcare: Geographic Revenue Mix, 2012

Figure 24 Bayer Healthcare: Market Strategy, 2011 – 2013

Figure 25 Bioniche: Total Revenue (\$Million), 2010 – 2012

Figure 26 Bioniche: Business Revenue Mix, 2012

Figure 27 Bioniche: Geographic Revenue Mix, 2012

Figure 28 Boehringer Ingelheim: Total Revenue (\$Million) And Operating Margin (%), 2010 – 2012

Figure 29 Boehringer Ingelheim: Business Revenue Mix, 2012

Figure 30 Ceva: Total Revenue (\$Million), 2010 – 2011

Figure 31 Heska: Total Revenue (\$Million) And Operating Margin (%), 2010 – 2012

- Figure 32 Heska: Business Revenue Mix, 2012
- Figure 33 Heska: Geographic Revenue Mix, 2012
- Figure 34 Merck: Total Revenue (\$Million) And Operating Margin (%), 2010 – 2012
- Figure 35 Merck Animal Health: Business Revenue Mix, 2011
- Figure 36 Merck: Geographic Revenue Mix, 2011
- Figure 37 Merck: Market Strategy, 2011 – 2013
- Figure 38 Merial: Total Revenue (\$Million), 2010 – 2012
- Figure 39 Merial: Market Strategy, 2011 – 2013
- Figure 40 Novartis: Total Revenue (\$Million), 2010 – 2012
- Figure 41 Novartis: Business Revenue Mix, 2012
- Figure 42 Novartis: Geographic Revenue Mix, 2012
- Figure 43 Virbac: Total Revenue (\$Million), 2010 – 2012
- Figure 44 Virbac: Business Revenue Mix, 2012
- Figure 45 Virbac: Geographic Revenue Mix, 2012
- Figure 46 Virbac, Market Strategy, 2011 – 2013
- Figure 47 Zoetis: Total Revenue (\$Million) And Operating Margin (%), 2010 – 2012
- Figure 48 Zoetis: Business Revenue Mix, 2012
- Figure 49 Zoetis: Geographic Revenue Mix, 2012
- Figure 50 Zoetis, Market Strategy, 2011 – 2013

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