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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

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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.

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