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Global Brucellosis Vaccines - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Global Brucellosis Vaccines Market size is estimated at USD 257.35 million in 2024, and is expected to reach USD 347.65 million by 2029, growing at a CAGR of 6.20% during the forecast period (2024-2029).

Brucellosis is one of the most widespread zoonoses transmitted by animals, and in endemic areas, human brucellosis has serious public health consequences. The expansion of animal industries and urbanization and the lack of hygienic measures in animal husbandry and food handling partly account for brucellosis remaining a public health hazard. For instance, in September 2023, the Centers for Disease Control and Prevention (CDC) estimated the global incidence of brucellosis was 2.1 million. In November 2023, another study was published in Frontiers in Microbiology, which reported that human brucellosis was more prevalent in the age group of 30 to 69 years old in China. Thus, the demand for brucellosis vaccines is expected to increase during the forecast period. However, this number is likely underestimated, as brucellosis cases are underreported and often misdiagnosed because of nonspecific symptoms, lack of understanding among doctors, and insufficient diagnostic laboratory capability.

B. melitensis is the most frequently reported cause of human illnesses worldwide, while the most widespread potential source of infection is B. abortus. Hence, the increasing prevalence of the disease is expected to increase the demand for a vaccine, thereby fueling the market’s growth during the forecast period.

Various government and non-government organizations' initiatives to raise awareness about animal diseases, health, and protection are expected to propel the growth of the market studied during the forecast period. The governments of different nations are

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introducing plans and guidelines for animal welfare. For instance, in October 2022, the UK Research and Innovation was funded with USD 2.5 million by the Biotechnology and Biological Sciences Research Council (BBSRS) for research projects to develop intervention strategies for combating endemic and infectious diseases and improving animal health. Such initiatives raise awareness about animal health and, thus, boost the market's growth. Furthermore, in November 2023, the Animal Welfare Task Group in Australia developed animal welfare standards and guidelines for cattle and sheep. The National Livestock Identification System (NLIS), an electronic identification system in which each animal is tagged with a radiofrequency identification device, has been developed for cattle.

Thus, the market studied is expected to witness growth during the forecast period due to the abovementioned factors. However, stringent animal vaccine regulation may hinder the market’s growth.

Global Brucellosis Vaccines Market Trends

Cattles Segment is Expected to Hold a Significant Market Share During the Forecast Period

Increasing cattle population and key developments like acquisitions by market players are expected to increase segmental growth. For instance, according to the January 2022 report of the US Department of Agriculture (USDA), there were about 91.9 million cattle and calves in the United States. Similarly, according to the March 2022 report by the USDA, Federation of American Scientists (FAS), New Delhi increased the total number of cattle to 306.9 million heads, an increase from the previous year. Hence, the increasing livestock population is expected to drive demand for more brucellosis vaccines, which is anticipated to boost the segment's growth.

Furthermore, many governments worldwide are launching a brucellosis vaccination program for cattle and other animals to eradicate brucellosis, which is further expected to impact the market studied significantly. For example, the Government of India is running a flagship scheme called the National Animal Disease Control Program (NADCP) to control foot and mouth disease (FMD) and brucellosis by vaccinating 100% of cattle, buffalo, sheep, goat, and pig population for FMD and 100% bovine female calves aged 4 to 8 months for brucellosis during 2019-2024 with a budget of USD 1,601.2 million (INR 13,343 crore). Therefore, owing to the abovementioned factors, the cattle segment is expected to have a significant share in the brucellosis vaccines market during the forecast period.

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North America is Expected to Dominate the Market During the Forecast Period

North America is expected to register a significant share in the brucellosis vaccines market owing to factors such as the presence of a large animal population, the high burden of brucellosis, increasing awareness about animal health, and the presence of key market players in the region. For instance, in January 2023, as per the Statistique Canada, Canadian farmers had 11.3 million cattle and calves, which increased from 11.1 million in 2022.

Further, in September 2023, as per the US Department of Agriculture, commercial beef production in the United States was estimated at USD 34.45 billion (GBP 26.941 billion) in 2023 and was expected to increase in 2024. This data showed high output and growing demand for meat products, which was expected to impact the market studied significantly. Further, the ongoing research and development activities and new developments from the key market players in the area are expected to boost the market’s growth. For instance, in December 2022, according to a research study published by the College of Veterinary Medicine, the University of Florida developed a new mucosal vaccine prototype that protects mice from brucellosis. Thus, developing vaccines and research activities are expected to impact the market's growth.

Therefore, owing to factors such as the growing cattle population, increasing demands for meat products, and research activities, the brucellosis vaccine market is expected to grow during the forecast period in North America.

Global Brucellosis Vaccines Industry Overview

Most players are based in developing countries due to the presence of large animal bases and agricultural environments. The market is partially fragmented, which makes it moderately competitive. Some companies currently dominating the market are Merck & Co. Inc., Ceva, CZ Vaccines, Laboratories Tornel, and Hester Biosciences Limited.

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