Veterinary Vaccine Market Forecasts to 2032 – Global Analysis By Type (Inactivated (Killed) Vaccines, Live Attenuated Vaccines, Toxoid Vaccines, Recombinant Vaccines, DNA Vaccines, Subunit Vaccines and Other Types), Animal, Disease, Technology, End User and By Geography

https://marketpublishers.com/r/VDE10DEC1862EN.html
Date: July 2025
Pages: 150
Price: US$ 4,150.00 (Single User License)
ID: VDE10DEC1862EN

Abstracts

According to Stratistics MRC, the Global Veterinary Vaccine Market is accounted for $12.98 billion in 2025 and is expected to reach $21.97 billion by 2032 growing at a CAGR of 7.8% during the forecast period. A veterinary vaccine is a biological preparation used to protect animals from specific infectious diseases by stimulating their immune systems. It contains antigens derived from pathogens such as viruses, bacteria, or parasites, which trigger an immune response without causing the disease itself. Veterinary vaccines are essential tools in preventing disease outbreaks, enhancing animal welfare, and improving food safety. They are widely used in both domestic pets and livestock to reduce the spread of zoonotic diseases, boost productivity, and decrease reliance on antibiotics in animal health management.

According to the National Bureau of Statistics China, China produced 57.94 million tonnes of pig meat in 2023, which represented a 5% increase from the previous year.

Market Dynamics:

Driver:

Rising prevalence of zoonotic diseases and livestock infections

The need for preventive measures to protect public health is growing as more diseases spread from animals to people. In order to protect animals and avoid financial losses due to disease outbreaks, livestock producers are spending money on vaccines. Vaccination programs are being promoted by governments and health organisations in an effort to curb the spread of illnesses. The need for updated and sophisticated vaccinations is further increased by the appearance of new disease strains. Innovation and growth in the veterinary vaccine sector are being driven by this increased urgency and awareness.

Restraint:

High cost and stringent regulatory approvals

Innovative vaccine development necessitates a large investment in cutting-edge technology and specialised knowledge. These costs frequently postpone product debuts and restrict access for smaller competitors. The intricacy is increased by strict regulatory approvals, which call for a great deal of safety and effectiveness testing. Time-to-market increases and innovation is discouraged by the drawn-out and expensive approval processes. All of these variables work together to limit the availability and growth of new veterinary vaccinations around the world.

Opportunity:

Advancements in vaccine technology and personalized animal care

Immune response is improved and adverse effects are decreased by innovations including vector-based vaccinations, mRNA-based vaccines, and recombinant DNA technologies. Faster reactions to newly developing zoonotic diseases are also made possible by these technologies. Demand for specialised vaccination plans based on species, breed, and health status is being driven by personalised animal care. Animal productivity and disease prevention are enhanced by this focused strategy. When taken as a whole, these dynamics greatly increase the market for veterinary vaccines' growth and relevance.

Threat:

Vaccine resistance and limited cold chain infrastructure in low-income regions

Cultural beliefs, misinformation, and doubts about the effectiveness of vaccines all play

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a part in this resistance. Furthermore, inadequate cold chain infrastructure compromises the effectiveness of vaccinations by affecting how they are stored and transported. The problem is made worse by inadequate refrigeration equipment and an unstable electrical supply. Disease outbreaks and vaccination coverage decline as a result of these issues. As a result, the veterinary vaccine market's expansion and efficacy in these areas continue to be limited.

Covid-19 Impact

The COVID-19 pandemic moderately impacted the Veterinary Vaccine Market. While disruptions in supply chains and reduced veterinary visits during lockdowns temporarily hindered vaccine distribution and sales, the sector rebounded as pet adoption increased and awareness of animal health grew. Governments and stakeholders emphasized disease prevention in animals to avoid zoonotic outbreaks, driving demand for vaccines. Moreover, advancements in biotechnology and diagnostic tools, inspired by the pandemic, accelerated innovation in veterinary vaccine development, supporting market recovery and long-term growth.

The recombinant vaccines segment is expected to be the largest during the forecast period

The recombinant vaccines segment is expected to account for the largest market share during the forecast period, due to safer immunization solutions. These vaccines reduce the risk of reversion to virulence, enhancing animal safety and vaccine stability. They enable rapid development against emerging diseases, supporting timely responses to outbreaks. Their efficiency in inducing strong immune responses leads to reduced dosage frequency and improved compliance. Additionally, the growing adoption of advanced biotechnology in veterinary medicine fuels the demand for recombinant vaccines globally.

The homecare settings segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the homecare settings segment is predicted to witness the highest growth rate by enabling convenient and timely administration of vaccines, especially for companion animals. It reduces the need for frequent veterinary clinic visits, making preventive care more accessible and less stressful for pets and owners. Growing pet ownership and increasing awareness about animal health are driving demand for home-use vaccines and related services. Technological advancements like easy-to-use vaccine delivery systems further support at-home administration. This shift enhances vaccination compliance and boosts overall market growth.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share due to increasing livestock populations, rising awareness of animal health, and supportive government initiatives. Countries like China, India, and Australia are witnessing increased demand for vaccines against foot-and-mouth disease, swine fever, and avian influenza. Expanding meat and dairy industries, along with improving veterinary infrastructure, further boost the market. However, challenges like regulatory barriers and limited cold chain logistics persist in rural areas.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to advanced animal healthcare systems, strong R&D investments, and a high focus on companion animal health. The U.S. and Canada lead in innovation and vaccine adoption, with widespread use of technologies like DNA and recombinant vaccines. Stringent regulatory frameworks ensure vaccine quality but also pose entry challenges for new products. Unlike Asia Pacific, pet insurance and veterinary service access significantly influence market dynamics, reflecting the region's mature and technology-intensive approach.

Key players in the market

Some of the key players profiled in the Veterinary Vaccine Market include Zoetis Inc., Boehringer Ingelheim GmbH, Merck & Co., Inc., Ceva Sante Animale, Elanco Animal Health, Virbac S.A., HIPRA, Phibro Animal Health Corporation, Vaxxinova International B.V., Biogenesis Bago, Hester Biosciences Limited, Indian Immunologicals Ltd., Neogen Corporation, Tianjin Ringpu Bio-Technology Co., Ltd., China Animal Husbandry Group, Jinyu Bio-technology Co., Ltd., Ourofino Saude Animal and Vetoquinol.

Key Developments:

In June 2025, Boehringer Ingelheim entered a strategic collaboration with Eko Health, a leader in AI-powered detection of heart and lung diseases, to improve heart murmur detection in dogs. This partnership combines BI's expertise in canine cardiology with Eko's digital stethoscope and AI algorithms. The collaboration aims to launch a canine-specific heart murmur detection algorithm via an Eko mobile app in 2026, enhancing early diagnosis and care for canine heart disease.

In March 2025, Zoetis collaborated with the Federation of European Companion Animal Veterinary Associations (FECAVA) and the Federation of Veterinarians of Europe (FVE) to launch a handbook promoting best practices and policy recommendations to strengthen the human-animal bond. This initiative highlights Zoetis's commitment to advancing animal and human health through multi-stakeholder engagement.

In September 2024, Boehringer Ingelheim acquired Saiba Animal Health, a Swiss company specializing in therapeutic vaccines for companion animals. The acquisition brings SAH's virus-like particle vaccine platform into BI's R&D portfolio, targeting chronic diseases such as allergies, inflammation, and pain in pets. This move builds on previous collaborations between the companies and is expected to accelerate the development of innovative therapeutic vaccines with longer-lasting effects.

Types Covered:

- Inactivated (Killed) Vaccines
- Live Attenuated Vaccines
- Toxoid Vaccines
- Recombinant Vaccines
- DNA Vaccines
- Subunit Vaccines
- Other Types

Animals Covered:

- Companion Animals
- Production Animals

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Diseases Covered:

- Canine Distemper
- Rabies
- Avian Influenza
- Newcastle Disease
- Brucellosis
- Bovine Viral Diarrhea (BVD)
- Other Diseases

Technologies Covered:

- Conventional Vaccines
- Advanced Vaccines

End Users Covered:

- Veterinary Hospitals & Clinics
- Livestock Farms
- Homecare Settings
- Research Institutes
- Other End Users

Regions Covered:

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- US
- Canada
- Mexico

Europe

- Germany
- UK
- Italy
- France
- Spain
- Rest of Europe

Asia Pacific

- Japan
- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
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Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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