

Brazil Animal Health Market By Product (Biologics, Pharmaceuticals, Medicinal Feed Additives, Others), By Animal Type (Production Animals, Companion Animals), By Route of Administration (Oral, Injectable, Intravenous, Topical, Others), By Disease (Porcine Diseases, Poultry Diseases, Cattle Diseases, Aquaculture Diseases, Others), By Distribution Channel (Retail, E-Commerce, Hospital/ Clinic Pharmacy), By Region, Competition, Forecast and Opportunities, 2020-2030F

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Abstracts

Brazil Animal Health Market was valued at USD 2.59 Billion in 2024 and is expected to reach USD 4.25 Billion in the forecast period with a CAGR of 8.56% through 2030. The Brazil Animal Health Market is witnessing robust growth owing to the increasing demand for veterinary healthcare services and products. The rising pet ownership in urban areas, coupled with growing awareness regarding animal health and welfare, has significantly fueled the demand for preventive care, diagnostics, and treatment solutions. The livestock segment, a critical part of Brazil's economy, is also experiencing a surge in demand for health products due to the expanding export markets for meat and dairy products. Advancements in veterinary pharmaceuticals and the introduction of innovative biologics and vaccines have further propelled the market's growth trajectory.

Key trends shaping the market include the increasing adoption of telemedicine and digital platforms in veterinary care, enabling better access to services for pet owners and livestock farmers. The proliferation of e-commerce platforms offering animal health

products has made these solutions more accessible, fostering growth among urban and rural consumers. Moreover, the focus on sustainable farming practices has led to heightened demand for products that ensure animal health while supporting environmental conservation. Companies are increasingly investing in research and development to introduce products that align with these emerging consumer and industry needs.

Despite the promising growth prospects, the market faces challenges such as the high cost of advanced veterinary services and products, which can limit access for certain segments of the population. A shortage of skilled veterinary professionals in rural areas and smaller towns poses additional hurdles to market penetration. Regulatory complexities surrounding the approval and distribution of animal health products also contribute to operational challenges. Addressing these issues requires strategic collaboration among industry players, government bodies, and stakeholders to ensure equitable growth across the sector.

Key Market Drivers

Rising Pet Ownership and Humanization of Pets

The rising pet ownership and the humanization of pets are significant market drivers in the Brazil Animal Health Market. As more Brazilians adopt pets, particularly in urban areas, there is a marked shift in how pets are perceived from mere animals to integral family members. This humanization trend has resulted in increased spending on pet healthcare, nutrition, and overall well-being. Pet owners are now more focused on providing their pets with high-quality food, regular veterinary visits, preventive healthcare, and specialized treatments, mirroring human healthcare practices. This shift is prompting a growing demand for advanced animal health products, such as vaccines, biologics, and diagnostic tools, to ensure the longevity and quality of life of pets.

The humanization trend is also driving the preference for premium pet products, including organic food, dietary supplements, and wellness treatments. Pet owners are increasingly investing in personalized care and treatments, fueling the growth of specialized veterinary services, including pet dermatology, dentistry, and holistic care. As Brazilian consumers become more knowledgeable about pet health and wellness, there is a rising demand for natural and sustainable products that align with their values regarding the environment and animal welfare.

Additionally, the increased awareness of zoonotic diseases and the health risks posed

by unvaccinated pets has led to a more proactive approach to animal health. Regular check-ups, vaccinations, and parasite control are now standard for many pet owners. The trend of pet humanization has transformed the Brazilian pet care market into a more sophisticated industry, which significantly boosts the demand for innovative and effective animal health solutions. This transformation is expected to continue as the pet care industry matures, making pet healthcare a major sector within the broader animal health market.

According to the Instituto Pet Brasil (IPB), the Brazilian pet market is projected to reach USD 11.50 billion in 2023, reflecting a 13.6% growth compared to the previous year. This growth is largely driven by increased spending on pet food, veterinary services, and pet care products, underscoring the expanding role of pets in Brazilian households and the corresponding demand for comprehensive animal health solutions.

Increasing Awareness About Zoonotic Diseases

Increasing awareness about zoonotic diseases is a significant driver for the Brazil Animal Health Market, particularly considering the growing recognition of the risks these diseases pose to both animal and human health. Zoonotic diseases, such as rabies, avian influenza, and leptospirosis, can have severe economic and public health consequences. With rising concerns about the transmission of diseases from animals to humans, particularly in rural and peri-urban areas, Brazilian authorities, veterinarians, and the public have become more proactive in addressing animal health issues. This heightened awareness has led to a surge in demand for preventative measures, including vaccines, diagnostic tools, and veterinary services.

In response to these concerns, government and health organizations have launched various initiatives aimed at controlling zoonotic diseases, such as mass vaccination campaigns for livestock and pets, and promoting better hygiene practices in agricultural settings. As part of these efforts, there has been an increasing focus on veterinary surveillance and diagnostic testing, ensuring early detection and intervention to prevent the spread of zoonotic pathogens. This emphasis on prevention has created significant growth opportunities for animal health products that can mitigate the risks of disease transmission.

Furthermore, pet owners are more invested in ensuring the health of their animals, given the heightened understanding of zoonotic threats. The demand for regular check-ups, vaccinations, and parasite control treatments has risen, contributing to the expansion of the animal health market. As zoonotic disease awareness continues to

grow, Brazil's commitment to improving both animal and human health is expected to result in greater adoption of preventive animal health solutions across the country.

According to the Brazilian Ministry of Agriculture, Livestock, and Supply (MAPA), as of 2020, diseases such as rabies, avian influenza, and leptospirosis are present in the country, highlighting the ongoing challenges in managing zoonotic diseases. This underscores the critical need for effective animal health measures to control and prevent the spread of these diseases.

Expansion of Veterinary Services and Infrastructure

The expansion of veterinary services and infrastructure is a key driver for the Brazil Animal Health Market, reflecting the growing demand for high-quality animal care across both rural and urban regions. As Brazil's livestock and pet sectors continue to grow, there is a rising need for more advanced veterinary services to address the health and well-being of animals. The increasing importance of animal welfare and the need to maintain livestock productivity have prompted significant investments in veterinary infrastructure, including the establishment of modern veterinary clinics, diagnostic laboratories, and specialized treatment centers.

The Brazilian government has played a crucial role in enhancing veterinary infrastructure by improving regulatory frameworks, establishing veterinary schools, and supporting the training of professionals to meet the growing demand for animal health services. The development of regional veterinary networks, particularly in rural areas, has made it easier for farmers and pet owners to access timely veterinary care, driving the adoption of preventive healthcare practices. This has been essential in preventing the spread of diseases, ensuring animal productivity, and improving food safety standards in the country.

The rise in pet ownership and the humanization of pets has also contributed to the growth of veterinary services, with an increasing number of pet owners seeking advanced care, including specialized treatments, surgeries, and emergency services. This growing demand has led to the establishment of pet hospitals and wellness centers offering a range of services tailored to companion animals. As the veterinary service market expands and becomes more accessible, the demand for animal health products, such as vaccines, medications, and diagnostic tools, continues to grow, further contributing to the overall growth of the Brazil Animal Health Market.

According to the Brazilian Institute of Geography and Statistics (IBGE), the veterinary

services sector has experienced consistent growth, with an annual increase in the number of veterinary establishments and professionals. This expansion reflects the country's commitment to improving animal health and welfare standards.

Key Market Challenges

Lack of Awareness About Preventive Healthcare

Lack of awareness about preventive healthcare remains a significant challenge for the Brazil Animal Health Market, particularly in rural and underserved areas. Many animal owners, particularly in remote regions, continue to prioritize treatment over prevention due to limited knowledge about the benefits of preventive care such as vaccinations, parasite control, and regular health check-ups. This mindset can result in animals not receiving necessary vaccinations or treatments until they exhibit symptoms of illness, leading to increased healthcare costs, prolonged suffering, and the spread of diseases within animal populations.

Farmers and pet owners in certain areas may lack access to information on best practices for animal health, which hampers their ability to take proactive measures. In some rural communities, there is also a perception that veterinary services are a luxury, leading to reluctance in seeking care until there is a noticeable issue. The lack of education on zoonotic diseases, such as rabies and avian influenza, further exacerbates the problem, leaving both animals and humans at risk.

Government and private sector initiatives are working to address this issue by launching educational campaigns and providing better access to veterinary services. However, the rural-urban divide in veterinary care accessibility and the general economic challenges faced by many animal owners still pose significant barriers. The need for continuous education, especially in remote areas, is critical for improving preventive healthcare adoption and reducing the impact of preventable diseases. Until awareness levels increase and the benefits of preventive care become more widely understood, the market will face continued challenges in encouraging the widespread adoption of preventive healthcare practices.

Counterfeit Products and Quality Control Issues

Counterfeit products and quality control issues are significant challenges for the Brazil Animal Health Market, posing risks to both animal health and public safety. The presence of counterfeit veterinary medicines, vaccines, and other animal health

products in the market has become a growing concern. These products, often sold at lower prices, can lack efficacy, contain harmful substances, or fail to meet regulatory standards, compromising the health of animals and increasing the potential for disease outbreaks. Counterfeit drugs may not be properly tested, leading to incorrect dosing, adverse reactions, or the failure to treat illnesses effectively.

The proliferation of counterfeit goods is driven by factors such as the lack of stringent enforcement of intellectual property rights, the high demand for affordable animal health products, and the insufficient regulation in some regions. The challenge is particularly acute in rural and remote areas where access to legitimate veterinary services is limited, and where counterfeit products may be the only available option for farmers and pet owners seeking quick and low-cost solutions. As a result, these products not only endanger animal health but also affect the broader agricultural economy by reducing livestock productivity and increasing veterinary costs.

The Brazilian government and regulatory bodies have made efforts to curb counterfeit products by implementing stricter regulations and improving enforcement measures. However, challenges remain in monitoring and controlling the vast and fragmented market. The rising awareness of the dangers posed by counterfeit products is driving demand for more reliable and traceable veterinary solutions. To address this, both industry stakeholders and authorities need to work collaboratively to enhance product quality control, ensure the availability of authentic products, and provide education to consumers on how to identify and avoid counterfeit veterinary products.

Key Market Trends

Adoption of Digital Technologies and Telemedicine

The adoption of digital technologies and telemedicine is becoming a prominent trend in the Brazil Animal Health Market, driven by advancements in technology and the growing need for efficient and accessible veterinary care. As more pet owners and livestock farmers seek convenient and cost-effective ways to manage animal health, digital tools are providing innovative solutions. Telemedicine allows veterinary professionals to remotely diagnose, monitor, and offer consultations for animals, reducing the need for in-person visits, especially in rural or hard-to-reach areas. This trend is making veterinary care more accessible, particularly for small-scale farmers and pet owners who may not have easy access to local clinics.

Digital platforms are also being used to streamline veterinary operations, from

appointment scheduling and medical record management to drug prescriptions and inventory tracking. These tools help improve the efficiency of veterinary services, reducing administrative burdens and allowing veterinarians to focus more on direct patient care. Mobile apps that provide health tracking, reminders for vaccinations and treatments, and access to educational resources are becoming increasingly popular among pet owners, helping them manage their pets' health more effectively.

In the livestock sector, digital technologies are helping farmers monitor animal health and productivity through wearable devices that track vital signs, behavior, and movements. This data is invaluable for early disease detection, improving livestock management, and ensuring better productivity. Digital technologies also enable farmers to receive real-time data on their animals, allowing for faster response times in addressing potential health issues.

As the demand for remote veterinary care and digital solutions grows, the Brazil Animal Health Market is embracing these innovations to improve care accessibility, efficiency, and quality. The continued integration of telemedicine and digital tools is expected to reshape the veterinary care landscape, benefiting both animals and their owners.

In June 2022, the Federal Council of Veterinary Medicine (CFMV) in Brazil issued Resolution No. 1,465/2022, officially regulating the practice of veterinary telemedicine. This resolution allows veterinarians with active registration in the CFMV/CRMVs system to provide remote consultations, telemonitoring, teletriage, teleorientation, teleinterconsultation, and telediagnosis, thereby enhancing the accessibility and efficiency of veterinary services across the country.

Growth in Biologics and Specialty Drugs

The growth in biologics and specialty drugs is a notable trend in the Brazil Animal Health Market, driven by advancements in veterinary medicine and the increasing demand for targeted treatments for various animal diseases. Biologics, including vaccines, monoclonal antibodies, and gene therapies, are becoming essential in treating complex diseases in both companion animals and livestock. These products offer more precise and effective solutions compared to traditional pharmaceutical treatments, particularly for conditions that require advanced and personalized care. Biologics are increasingly being used to treat a wide range of diseases, from infectious diseases in livestock to chronic conditions in pets, such as arthritis and allergies.

The rise in the prevalence of chronic diseases, such as cancer, autoimmune disorders,

and skin conditions in pets, is driving the demand for specialty drugs, which include immunotherapies, biologics, and advanced pain management solutions. Pet owners are increasingly willing to invest in these high-quality, innovative treatments to ensure better quality of life for their animals, particularly as the humanization of pets continues. This trend is creating new opportunities for pharmaceutical companies to develop and market biologic treatments and specialty drugs tailored to the needs of animals.

The Brazilian government's investment in veterinary healthcare infrastructure, coupled with improved veterinary education and training, has contributed to the increased adoption of biologics and specialty drugs in the country. Veterinarians are now better equipped to diagnose and treat complex diseases, leading to a more widespread use of these advanced therapies. The increasing availability of biologics in the Brazilian market, supported by regulatory approvals and improved access to these therapies, is expected to drive significant growth in the animal health sector over the coming years. The trend toward biologics and specialty drugs is reshaping veterinary medicine, offering better treatment options for animals and expanding the capabilities of veterinary professionals.

In 2023, the Brazilian Ministry of Agriculture, Livestock, and Food Supply (MAPA) launched the National Program for Biobased Agricultural Inputs, aiming to sustainably explore the potential of Brazilian biodiversity to reduce farmers' dependence on imported inputs and expand the supply of raw materials for the sector. This initiative underscores the government's commitment to enhancing the quality and reliability of biobased inputs, including biologics, thereby improving Brazilian farming and benefiting agricultural value chains and consumers.

Furthermore, the Brazilian Health Regulatory Agency (Anvisa) plays a crucial role in regulating veterinary biologics and specialty drugs. Anvisa's stringent regulatory processes ensure that these products meet high safety and efficacy standards, fostering trust among veterinarians and pet owners. The agency's oversight is vital for the continued growth and adoption of biologics and specialty drugs in Brazil's animal health market.

Segmental Insights

Animal Type Insights

Based on the Animal Type, Companion Animals emerged as the dominant segment in the Brazil Animal Health Market in 2024. This is driven by the increasing humanization

of pets and the growing number of pet owners in the country. As pets are increasingly seen as family members, there has been a heightened focus on their well-being, leading to greater demand for veterinary care, specialized treatments, and preventive healthcare. Brazil has witnessed a rise in pet ownership, with millions of households keeping dogs, cats, and other companion animals, further fueling the demand for animal health products and services. This growing emotional bond between pet owners and their animals is contributing to an increase in spending on pet health, including vaccines, medications, dental care, and surgeries. With rising disposable incomes and changing lifestyles, Brazilian pet owners are more willing to invest in premium health solutions for their pets, resulting in a booming market for companion animal healthcare. Moreover, the increasing awareness of zoonotic diseases and the need for preventive care, such as vaccinations and parasite control, has further pushed the demand for veterinary services and products in the companion animal sector.

Disease Insights

Based on the Disease, Cattle Diseases emerged as the dominant segment in the Brazil Animal Health Market in 2024. This is due to the significant role of the livestock industry in Brazil's economy and the challenges posed by various infectious and chronic diseases. As one of the world's largest producers and exporters of beef, Brazil has a vast cattle population that requires continuous healthcare to ensure high productivity and disease control. The prevalence of cattle diseases such as Foot and Mouth Disease (FMD), bovine tuberculosis, brucellosis, and mastitis poses a constant threat to the livestock industry, necessitating widespread veterinary care and preventative measures. The economic importance of cattle farming drives the demand for effective treatments, vaccines, and diagnostic tools to manage these diseases. Additionally, the Brazilian government's efforts to control and eradicate livestock diseases, such as the extensive vaccination programs for FMD and other diseases, have further increased the need for specialized animal health products. The focus on maintaining the health of cattle to ensure safe meat production and exports has led to a strong demand for veterinary services and medicines aimed at preventing and controlling diseases in cattle.

Regional Insights

The South-East region emerged as the dominant region in the Brazil Animal Health Market in 2024. This is due to its economic significance, industrial infrastructure, and high population density. As Brazil's most economically developed region, the South-East is home to major urban centers such as S?o Paulo, Rio de Janeiro, and Belo

Horizonte, which contribute significantly to the demand for companion animal healthcare and veterinary services. The region's high standard of living, coupled with an increasing number of pet owners, drives the demand for advanced veterinary care, including vaccinations, treatments, and specialized services for companion animals.

In addition, the South-East is a key hub for the livestock industry, with a large concentration of cattle farming operations. The region plays a crucial role in Brazil's beef production and export, making cattle health a top priority. The extensive presence of farms, coupled with the need for disease prevention and management, boosts demand for animal health products such as vaccines, antibiotics, and diagnostic tools. Furthermore, the region's strong veterinary infrastructure and well-established healthcare networks make it a favorable environment for the growth of the animal health market. As a result of these factors, the South-East region is poised to remain the dominant player in the Brazil Animal Health Market in 2024, with continued growth driven by both the companion animal and livestock sectors.

Key Market Players

Zoetis Inc.

Elanco Animal Health Inc.

Ceva Animal Health, LLC

Merck & Co., Inc.

VETOQUINOL S.A.

Boehringer Ingelheim International GmbH

Virbac S.A.

Phibro Animal Health Corporation

Dechra Pharmaceuticals Plc

Bimeda, Inc.

Report Scope:

In this report, the Brazil Animal Health Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Brazil Animal Health Market, By Product:

Biologics

Pharmaceuticals

Medicinal Feed Additives

Others

Brazil Animal Health Market, By Animal Type:

Production Animals

Companion Animals

Brazil Animal Health Market, By Route of Administration:

Oral

Injectable

Intravenous

Topical

Others

Brazil Animal Health Market, By Disease:

Porcine Diseases

Poultry Diseases

Cattle Diseases

Aquaculture Diseases

Others

Brazil Animal Health Market, By Distribution Channel:

Retail

E-Commerce

Hospital/ Clinic Pharmacy

Brazil Animal Health Market, By Region:

South-East

North-East

South

Central West

North

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Brazil Animal Health Market.

Available Customizations:

Brazil Animal Health Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Brazil Animal Health Market By Product (Biologics, Pharmaceuticals, Medicinal Feed Additives, Others), By Anim...

Detailed analysis and profiling of additional market players (up to five).

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