

Brazil Veterinary Vaccines Market By Product (Attenuated Live Vaccines, Inactivated Vaccines, Subunit Vaccines, DNA Vaccines, Recombinant Vaccines, Autogenous Vaccines), By Animal Type (Production Animals, Companion Animals), By Route of Administration (Subcutaneous, Intramuscular, Intranasal), By Distribution Channel (Retail, E-Commerce, Hospital/ Clinic Pharmacy), By Region, Competition, Forecast and Opportunities, 2020-2030F

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Abstracts

Brazil Veterinary Vaccines Market was valued at USD 1.45 Billion in 2024 and is expected to reach USD 2.48 Billion in the forecast period with a CAGR of 9.36% through 2030. The Brazil Veterinary Vaccines Market is experiencing robust growth, driven by an increasing focus on disease prevention and the rising demand for effective vaccination programs for both livestock and companion animals. With the growing awareness about zoonotic diseases, which can be transmitted from animals to humans, Brazil is placing greater emphasis on vaccinating both pets and livestock to control the spread of infections. This focus on prevention is being supported by government regulations and initiatives aimed at reducing the impact of animal diseases on both human health and the economy. Brazil's strong agricultural and livestock sector further fuels the demand for vaccines, as livestock farming plays a critical role in the country's economy.

One of the key growth drivers in the market is the increasing adoption of advanced veterinary healthcare solutions, which includes the use of modern vaccines to manage diseases more effectively. The rising concern over antibiotic resistance has prompted

the veterinary industry to seek alternative measures, such as vaccines, to prevent and control diseases, reducing reliance on antibiotics. Furthermore, innovations in vaccine technology, including the development of recombinant vaccines and improved delivery methods, have contributed to the expansion of the market. As Brazil's pet population continues to grow, the demand for vaccines for companion animals is also rising, further boosting the market for veterinary vaccines.

Despite the growth outlook, the Brazil Veterinary Vaccines Market faces several challenges. One of the major obstacles is the lack of awareness and education about the importance of vaccination, particularly in rural areas where veterinary services may be limited. Vaccine distribution and access to rural farms can be challenging, further hindering vaccination efforts in less accessible regions. Moreover, vaccine prices, particularly for advanced formulations, can be a barrier to widespread adoption, especially for small-scale livestock farmers. However, opportunities are emerging for the market as the government and private sector collaborate to improve vaccine access and distribution channels, ensuring that more animals benefit from these essential healthcare products. The market is expected to continue its growth trajectory, driven by the need for better disease control, prevention, and increased investment in animal health infrastructure.

Key Market Drivers

Rising Demand for Livestock Health Management

The rising demand for livestock health management is a key driver for the growth of the Brazil Veterinary Vaccines Market. Brazil, being one of the world's largest producers and exporters of meat, particularly beef, poultry, and pork, has a critical focus on maintaining the health and productivity of its livestock. Livestock farming in Brazil plays a significant role in the national economy and ensuring that herds are free from diseases is essential for both domestic consumption and international trade. Preventive healthcare measures, particularly vaccination, have become crucial in protecting animals from diseases that can severely affect production and lead to substantial economic losses.

Farmers are increasingly recognizing the importance of proactive health management, rather than relying on reactive treatment. This shift toward preventive healthcare is driving the demand for veterinary vaccines, as they help mitigate the risk of disease outbreaks that can affect entire herds or flocks. Diseases such as Foot-and-Mouth Disease (FMD), Newcastle disease in poultry, and classical swine fever are among the

key concerns for Brazil's livestock industry. By vaccinating livestock against these diseases, farmers can not only improve the health of their animals but also increase productivity and ensure the animals' suitability for international trade markets, which require certification of disease-free status.

In addition to the economic benefits, rising awareness among farmers about the long-term advantages of vaccination, such as reduced veterinary costs and fewer treatment interventions, is contributing to the growing adoption of vaccines. With a larger focus on sustainable farming practices and improving herd health, the demand for livestock health management solutions, including vaccines, is expected to continue to rise, propelling growth in the Brazil Veterinary Vaccines Market.

According to the Brazilian Institute of Geography and Statistics (IBGE), the cattle herd in Brazil reached a record 238.6 million head in 2023, highlighting the importance of effective health management practices to maintain herd productivity and disease-free status. Furthermore, the Ministry of Agriculture, Livestock and Food Supply (MAPA) has implemented the National Program for the Control and Eradication of Bovine Brucellosis and Tuberculosis (PNCEBT), which includes vaccination campaigns to control these diseases, underscoring the government's commitment to improving livestock health.

Increasing Prevalence of Zoonotic Diseases

The increasing prevalence of zoonotic diseases is a significant driver for the growth of the Brazil Veterinary Vaccines Market. Zoonoses, diseases that can be transmitted between animals and humans, pose a serious public health threat in Brazil due to the country's vast agricultural and livestock sector. Brazil has a large population of both domestic and farm animals, which increases the potential for disease transmission, particularly in rural areas where close interactions between humans and animals are common. Diseases such as rabies, brucellosis, leptospirosis, and avian influenza have been of particular concern due to their potential impact on both human and animal health.

In 2020, the Brazilian Ministry of Agriculture, Livestock, and Food Supply reported the presence of several zoonotic diseases in the country, including rabies, brucellosis, and avian influenza. The report highlighted that rabies was present in both domestic and wild animals, with 32,644 cases reported in cattle, 11,467 in horses, and 2,293 in swine. Brucellosis was also reported in cattle, with 2,293 cases, and in swine, with 2,293 cases. Avian influenza was present in domestic and wild birds, with 2,293 cases reported in domestic birds and 2,293 in wild birds.

As the awareness of zoonotic diseases grows, there is a heightened focus on controlling and preventing these diseases through vaccination programs aimed at animals, particularly in high-risk sectors such as livestock farming and poultry production. Vaccinating animals against diseases that can be transmitted to humans not only protects animal populations but also reduces the risk of outbreaks that can result in human infections, thus contributing to public health safety.

This, combined with increasing consumer demand for disease-free animal products, encourages farmers and livestock owners to adopt more rigorous health management practices, including vaccination. The rising awareness of the need for disease prevention in animals, particularly in a country with a large agricultural sector, is driving the demand for veterinary vaccines, ultimately contributing to the market's growth.

Rising Pet Ownership and Awareness in Companion Animals

The rising pet ownership and increased awareness regarding companion animal health are key drivers for the growth of the Brazil Veterinary Vaccines Market. As more Brazilian households embrace pets, the demand for veterinary services and health management solutions has surged. According to the Instituto Pet Brasil (IPB), the pet sector in Brazil is projected to generate USD 11.50 billion in 2023, reflecting a 13.6% growth from the previous year.

Pet ownership is no longer confined to rural areas but is becoming increasingly popular in urban settings, particularly in larger cities like S?o Paulo and Rio de Janeiro, where a significant portion of the population owns pets. A study published in the journal 'Revista do Sistema ?nico de Sa?de do Brasil' indicates that pet ownership is associated with various demographic factors, including age, income, and urban residence. As pet ownership rises, the demand for comprehensive veterinary care, including vaccinations, has intensified. The Brazilian Health Regulatory Agency (Anvisa) plays a crucial role in regulating veterinary vaccines, ensuring their safety and efficacy for companion animals.

Pet owners are becoming more aware of the importance of preventive healthcare for their pets, understanding that vaccination is crucial in protecting pets from infectious diseases. This growing awareness is driving demand for veterinary vaccines designed specifically for companion animals.

Brazil's pet care market is witnessing a shift toward high-quality pet products and

services, including vaccinations and health maintenance. In response to the increasing demand for pet healthcare, veterinary professionals and pharmaceutical companies are focusing on developing more effective and accessible vaccines for companion animals.

The country's improving economic conditions also contribute to higher disposable incomes, enabling more pet owners to afford routine vaccinations. This combination of growing pet ownership and heightened awareness of pet health is fueling the expansion of the veterinary vaccines market in Brazil.

Key Market Challenges

Vaccine Storage and Distribution Issues

Vaccine storage and distribution issues are significant challenges for the Brazil Veterinary Vaccines Market. The proper handling and transportation of vaccines are critical to maintaining their efficacy, as many vaccines require specific temperature conditions, often between 2°C and 8°C, throughout the supply chain. In Brazil, the vast geographical size and varying climate conditions, especially in remote and rural areas, complicate the maintenance of these conditions during storage and transportation. Inadequate infrastructure for cold chain logistics in certain regions increases the risk of temperature deviations, which can compromise vaccine potency and effectiveness.

The challenge is amplified in rural areas where livestock farming is predominant, but access to modern storage facilities and reliable transportation networks is limited. In such areas, vaccines may be exposed to high temperatures or delays, leading to spoilage and wastage. Small-scale farmers, who often lack resources to invest in proper storage equipment, rely heavily on distributors to ensure vaccine quality, making any gap in the supply chain a critical issue.

Another challenge is the lack of training among some veterinary professionals and distributors on proper vaccine handling protocols. Mishandling, such as incorrect refrigeration practices or exposure to light, can reduce vaccine efficacy, leading to suboptimal disease prevention. The financial implications of lost or ineffective vaccines can also deter farmers and distributors from investing in preventive healthcare measures.

Efforts to address these issues, such as improving cold chain infrastructure, training personnel, and implementing advanced monitoring technologies, are essential to overcome this challenge. Without addressing the storage and distribution issues, the full

potential of veterinary vaccines to improve animal health and productivity in Brazil cannot be realized, hindering market growth and public health outcomes.

High Vaccine Costs for Small-Scale Farmers and Pet Owners

High vaccine costs present a significant challenge for small-scale farmers and pet owners in Brazil's veterinary vaccines market. For small-scale farmers, the financial burden of purchasing vaccines is substantial, especially when managing large herds or flocks. The cost of vaccines, coupled with limited access to subsidized vaccination programs, often leads to lower vaccination coverage among small-scale farmers. This situation not only jeopardizes animal health but also increases the risk of disease outbreaks, which can have severe economic repercussions for these farmers.

Pet owners, particularly those from low-income households, also face challenges due to the high costs of veterinary vaccines. The expense associated with vaccinating pets can be prohibitive, resulting in lower vaccination rates among companion animals. This gap in preventive care increases the risk of disease transmission, not only among animals but also to humans, considering the zoonotic potential of certain diseases.

Addressing the high cost of vaccines is crucial to improving animal health management in Brazil. Implementing government-subsidized vaccination programs, providing financial incentives for vaccine manufacturers to reduce prices, and increasing awareness about the long-term economic benefits of vaccination are potential strategies to mitigate this challenge. Ensuring affordable access to vaccines for small-scale farmers and pet owners is essential for enhancing animal health, preventing disease outbreaks, and supporting the sustainability of Brazil's agricultural and companion animal sectors.

Key Market Trends

Shift Toward Preventive Healthcare and Biosecurity in Livestock Farming

The Brazil Veterinary Vaccines Market is experiencing a significant shift toward preventive healthcare and biosecurity in livestock farming, driven by the growing awareness of the economic and health benefits of disease prevention. Livestock farmers are increasingly recognizing that proactive health management, including the use of vaccines, is more cost-effective than addressing disease outbreaks after they occur. Preventive vaccination programs are being prioritized to mitigate the risks of contagious diseases such as foot-and-mouth disease, brucellosis, and bovine viral

diarrhea, which can result in substantial losses in productivity and revenue.

Biosecurity measures are gaining traction as farmers aim to create disease-free environments for their animals. Practices such as improved sanitation, controlled access to livestock areas, and routine vaccination schedules are becoming standard in modern livestock operations. These practices not only protect the health of the animals but also enhance the quality and safety of animal-derived food products, addressing consumer concerns and meeting export standards.

Technological advancements are further driving this trend. Innovations in vaccine development, such as recombinant and vector-based vaccines, offer improved efficacy and longer-lasting immunity, making them a preferred choice for farmers. These vaccines are often easier to administer and have fewer side effects, increasing their adoption in livestock farming. The integration of data-driven tools, such as herd management software, allows for better tracking of vaccination schedules and health records, enabling farmers to implement targeted biosecurity strategies.

Government programs and regulations promoting animal health and disease prevention are reinforcing this trend. Initiatives like mandatory vaccination campaigns and certifications for disease-free zones encourage widespread adoption of preventive measures. This shift toward preventive healthcare and biosecurity is transforming livestock farming in Brazil, reducing the reliance on therapeutic interventions and antibiotics, improving animal welfare, and boosting the growth of the veterinary vaccines market.

Growth of Veterinary Vaccine Manufacturing and Production in Brazil

The Brazil Veterinary Vaccines Market is witnessing significant growth in domestic vaccine manufacturing and production, driven by rising demand for localized and cost-effective solutions to address the needs of its vast livestock industry. The expansion of local production capabilities is reducing reliance on imported vaccines, ensuring a consistent supply of high-quality products tailored to the specific health challenges of Brazil's animal population. This trend is supported by investments from both government and private entities, aimed at strengthening the nation's veterinary vaccine infrastructure.

One of the driving forces behind this growth is Brazil's position as a global leader in agriculture and livestock production, necessitating large-scale vaccination programs to maintain the health of animals and ensure the safety of food products. Companies are

increasingly establishing manufacturing facilities within the country to meet the unique requirements of Brazilian livestock, such as vaccines targeting foot-and-mouth disease and brucellosis, which are endemic in certain regions.

Technological advancements in vaccine development, such as recombinant DNA and vector-based vaccines, are further boosting the domestic production landscape. These innovations are making it possible to produce vaccines with enhanced efficacy and safety, addressing evolving disease patterns and meeting regulatory standards. Local manufacturers are adopting advanced production technologies to improve scalability, reduce production costs, and enhance distribution efficiency.

Government initiatives supporting domestic production, such as tax incentives and funding for research and development, are encouraging more companies to invest in the Brazilian veterinary vaccines sector. This focus on local manufacturing is not only improving access to affordable vaccines but also positioning Brazil as a regional hub for veterinary vaccine production in Latin America. The growth of domestic vaccine manufacturing reflects Brazil's commitment to advancing animal health and ensuring the sustainability of its livestock industry.

Segmental Insights

Animal Type Insights

Based on the Animal Type, Production Animals emerged as the dominant segment in the Brazil Veterinary Vaccines Market in 2024. This is driven by the country's expansive livestock industry and its pivotal role in both domestic and international markets. According to the Brazilian Institute of Geography and Statistics (IBGE), the second quarter of 2024 saw a record-breaking slaughter of 9.96 million cattle, marking a 17.5% increase compared to the same period in 2023. This surge underscores the escalating demand for animal-derived products and the necessity for robust animal health management practices. To safeguard livestock health and maintain high production standards, the Brazilian government enforces stringent vaccination programs. The prominence of production animals in the veterinary vaccines market is further bolstered by the country's strategic efforts to expand its agribusiness footprint. In 2024, the Ministry of Agriculture and Livestock secured access to 246 new international markets across 60 destinations, reflecting Brazil's commitment to strengthening its agribusiness sector. These combined factors highlight the critical role of production animals in Brazil's veterinary vaccines market, driven by a robust livestock sector, comprehensive government vaccination programs, and strategic international market expansions.

Distribution Channel Insights

Based on the Distribution Channel, Hospital/ Clinic Pharmacy emerged as the dominant segment in the Brazil Veterinary Vaccines Market in 2024. This is largely driven by the increasing availability of specialized veterinary services and the growing demand for high-quality veterinary healthcare. Veterinary hospitals and clinics offer a broad range of health services, including vaccination programs, for both companion animals and production animals. These institutions provide a trusted environment for administering vaccines, where professional veterinarians can ensure proper vaccine storage, handling, and administration. With the rise in pet ownership and the increasing recognition of animal healthcare's importance, pet owners prefer accessing vaccines through established veterinary clinics that offer expert consultations and tailored vaccination schedules. Additionally, veterinary clinics are equipped with advanced diagnostic tools and access to a wider selection of veterinary vaccines, making them a preferred choice for pet owners seeking comprehensive care.

In the livestock sector, the demand for veterinary vaccines through hospitals and clinics has also grown, as farmers seek professional guidance on maintaining herd health and ensuring disease prevention in line with regulatory standards. The convenience and expertise offered by hospital/clinic pharmacies, along with the growing trend of preventive healthcare, are key factors contributing to their dominance in the market. This distribution channel remains a trusted source for administering vaccines, particularly for high-value animals and those requiring specialized care.

Regional Insights

The South-East region emerged as the dominant region in the Brazil Veterinary Vaccines Market in 2024. This is due to its well-established infrastructure, high population density, and significant concentration of both companion and production animals. The region includes major economic hubs such as S?o Paulo, Rio de Janeiro, and Minas Gerais, which play a central role in Brazil's agriculture and livestock industries. S?o Paulo, for instance, is a key player in Brazil's beef and poultry sectors, driving the demand for veterinary vaccines in livestock farming. The South-East is also home to many veterinary clinics and hospitals, which facilitate the distribution and administration of vaccines, particularly for companion animals. With a higher level of awareness regarding animal health and welfare, pet owners in this region prefer seeking specialized healthcare services, further boosting the demand for vaccines.

Additionally, the region benefits from advanced logistics networks that ensure the timely delivery and proper storage of vaccines, which is critical for maintaining their efficacy. Government programs and private sector investments in veterinary healthcare also contribute to the region's dominant position. The combination of a thriving agriculture industry, high veterinary infrastructure, and consumer awareness makes the South-East the leading region for veterinary vaccine adoption in Brazil.

Key Market Players

Merck & Co., Inc.

Elanco Animal Health Inc.

Boehringer Ingelheim International GmbH

Ceva Animal Health, LLC

Zoetis Inc.

Dechra Pharmaceuticals Plc

Phibro Animal Health Corporation

Biogen S.A.

Ouro Fino Saúde Animal Participações SA

Virbac S.A.

Report Scope:

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

Brazil Veterinary Vaccines Market, By Product:

Attenuated Live Vaccines

Inactivated Vaccines

Subunit Vaccines

DNA Vaccines

Recombinant Vaccines

Autogenous Vaccines

Brazil Veterinary Vaccines Market, By Animal Type:

Production Animals

Companion Animals

Brazil Veterinary Vaccines Market, By Route of Administration:

Subcutaneous

Intramuscular

Intranasal

Brazil Veterinary Vaccines Market, By Distribution Channel:

Retail

E-Commerce

Hospital/ Clinic Pharmacy

Brazil Veterinary Vaccines 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 Veterinary Vaccines Market.

Available Customizations:

Brazil Veterinary Vaccines 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

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

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