

Canine Atopic Dermatitis Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Glucocorticoids, Antihistamines, Immunosuppressants, MAbs, Others), By Mode of Administration (Topical, Oral, Injectable), By Distribution Channel (Veterinary Hospitals/Clinics, Retail, E-commerce), By Region, and By Competition

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Abstracts

Global Canine Atopic Dermatitis Market has valued at USD 995.60 million in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 9.90% through 2028. The Global Canine Atopic Dermatitis Market refers to the market for products and services related to the diagnosis, treatment, and management of atopic dermatitis in dogs. Canine atopic dermatitis is a common skin condition in dogs that causes itching, inflammation, and discomfort. The market encompasses various products and treatments aimed at alleviating the symptoms and improving the quality of life for affected dogs.

Key Market Drivers

Rising Pet Ownership and Humanization

In recent years, the global pet industry has witnessed remarkable growth, with a significant portion of this growth attributed to the rising number of pet owners worldwide. Alongside this surge in pet ownership is a trend of humanization, where pets are increasingly regarded as family members rather than mere companions. This shift in perspective has profound implications, not only for the well-being of pets but also for various pet-related markets, including the global canine atopic dermatitis market.

The most straightforward factor contributing to the growth of the canine atopic dermatitis market is the rising number of pets, particularly dogs, in households across the globe. According to the American Pet Products Association (APPA), pet ownership in the United States alone reached an all-time high in 2020, with approximately 67% of households owning a pet, including 63 million households with dogs. This surge in pet ownership directly correlates with a higher demand for pet healthcare products and services, including treatments for conditions like atopic dermatitis.

Pet owners are now more inclined to treat their furry companions as family members. This 'humanization' of pets has led to increased awareness of their physical and emotional well-being. As a result, pet owners are more likely to invest in high-quality pet care, including preventive healthcare and the management of chronic conditions like canine atopic dermatitis.

As pet owners consider their dogs as integral parts of their lives, they seek to provide the best possible quality of life for their four-legged family members. Atopic dermatitis can cause immense discomfort and suffering for dogs, leading pet owners to actively seek treatments and solutions to improve their pets' overall well-being.

The humanization of pets has fueled an expansion in the pet healthcare market. Veterinary clinics, pharmaceutical companies, and pet healthcare providers are responding to this growing demand by developing and offering a wide range of products and services tailored to the specific needs of pets, including treatments for conditions like atopic dermatitis.

Pet owners are increasingly focused on their pets' health and wellness. They are proactively seeking information on pet nutrition, exercise, and preventive healthcare, which includes understanding and addressing skin conditions like atopic dermatitis. This focus on pet health extends to a willingness to invest in treatments that can alleviate discomfort and improve the pet's quality of life.

The humanization of pets is accompanied by a greater financial commitment to their well-being. This includes allocating budgets for regular veterinary check-ups, medications, and treatments for chronic conditions like canine atopic dermatitis. The willingness to invest in pet health contributes to market growth.

Increased Prevalence of Canine Atopic Dermatitis

Canine atopic dermatitis, a chronic and itchy skin condition, has been increasingly prevalent in dogs worldwide. The surge in the number of dogs afflicted by this condition has profound implications for the pet healthcare industry, particularly the global canine atopic dermatitis market.

In recent years, there has been a noticeable rise in the prevalence of canine atopic dermatitis, making it one of the most common skin conditions affecting dogs. This increase is attributed to several factors, including environmental changes, genetic predisposition, and heightened exposure to allergens. As more dogs are diagnosed with this condition, the demand for effective treatments and solutions is growing, fueling the expansion of the global canine atopic dermatitis market.

Environmental changes, such as increased pollution, climate variations, and changes in the prevalence of allergenic plants, have contributed to the rising incidence of atopic dermatitis in dogs. These changes have led to a higher prevalence of environmental allergens, which are often triggers for atopic dermatitis.

Genetics plays a crucial role in the development of canine atopic dermatitis. Certain breeds are more genetically susceptible to the condition. As dog breeding continues and specific breeds become more popular, the likelihood of atopic dermatitis cases increases, further boosting the demand for treatments and care.

Dogs are increasingly exposed to a wide range of allergens in their environment. These can include pollen, dust mites, molds, and certain foods. Increased exposure to these allergens has contributed to a higher incidence of atopic dermatitis in dogs.

With greater awareness and understanding of canine atopic dermatitis, pet owners are more inclined to seek professional veterinary advice when they suspect their dog is suffering from this condition. Early diagnosis allows for timely intervention and management of the disease, driving the demand for diagnostic tests and treatment options.

Pharmaceutical companies and pet healthcare providers are responding to the rising prevalence of canine atopic dermatitis by developing an array of innovative treatments. These include medicated shampoos, topical creams, oral medications, vaccines, and allergy testing kits. The expanding product offerings cater to the diverse needs of affected dogs, contributing to market growth.

The growing prevalence of atopic dermatitis has prompted pet owners to seek

professional veterinary care. This, in turn, has led to increased awareness of the condition and the importance of early diagnosis and management. Veterinarians play a pivotal role in educating pet owners and recommending suitable treatments.

Ongoing research into the causes and treatments of canine atopic dermatitis is fostering the development of more effective therapies and products. This research is instrumental in addressing the condition's growing prevalence and furthering the growth of the canine atopic dermatitis market.

Advancements in Veterinary Medicine

The field of veterinary medicine has made remarkable strides in recent years, not only in ensuring the well-being of our beloved pets but also in driving growth in associated markets. One area where these advancements are particularly evident is the treatment of canine atopic dermatitis.

Canine atopic dermatitis is a common skin condition affecting dogs worldwide. This itchy and often chronic condition can cause immense discomfort and suffering for our four-legged friends. As a result, there is a growing demand for effective treatments and therapies. Advancements in veterinary medicine have been instrumental in meeting this demand.

One significant advancement in veterinary medicine is the development of innovative diagnostic tools. Veterinarians now have access to advanced allergy testing, patch tests, and blood tests to accurately diagnose canine atopic dermatitis. These tools allow for quicker and more precise identification of the condition, leading to faster intervention and treatment.

Advancements in veterinary medicine have facilitated the creation of tailored treatment plans for dogs with atopic dermatitis. Veterinarians can now consider an individual dog's health status, age, and specific triggers to design a treatment plan that optimally manages the condition. This personalized approach is more effective and helps improve the dog's quality of life.

Pharmaceutical companies are continually developing new medications and therapies to treat atopic dermatitis in dogs. These advancements include topical creams, oral medications, and vaccines designed to alleviate symptoms and prevent future outbreaks. Veterinary medicine's contributions in this area are fundamental to the growth of the canine atopic dermatitis market.

Another noteworthy development in veterinary medicine is allergen-specific immunotherapy (ASIT). This therapy helps desensitize dogs to specific allergens responsible for their atopic dermatitis. ASIT has shown promising results in reducing symptoms and improving the long-term prognosis for affected dogs.

Innovations in veterinary medicine have also expanded the range of treatment options for atopic dermatitis. Holistic and nutritional approaches, alongside traditional medications, are now considered part of a comprehensive treatment plan. This holistic perspective provides a more well-rounded approach to managing the condition.

Expanding Product Portfolio

The global canine atopic dermatitis market is experiencing significant growth, driven by a confluence of factors. Among these, one of the most notable is the continuous expansion of the product portfolio tailored for the diagnosis, treatment, and management of this common and often challenging skin condition in dogs.

Canine atopic dermatitis is a complex condition with various triggers, including allergens, genetics, and environmental factors. A one-size-fits-all solution is often ineffective, necessitating a multi-faceted approach. The expanding product portfolio addresses this need by offering a wide array of treatments and diagnostic tools tailored to different dogs and their unique requirements.

One of the most significant contributions to the expanding product portfolio is the development of an array of medications and therapies. Pharmaceutical companies are continually researching and introducing new treatments, including oral medications, topical creams, and injectable therapies designed to alleviate the symptoms and discomfort associated with atopic dermatitis.

Medicated shampoos and topical solutions have become increasingly popular options for treating canine atopic dermatitis. These products help soothe irritated skin, reduce inflammation, and provide relief from itching. The availability of diverse choices within this category allows pet owners and veterinarians to select the most suitable option for a specific dog.

Accurate diagnosis is a crucial step in managing atopic dermatitis effectively. The expansion of product offerings includes advanced allergy testing and diagnosis kits that provide more precise information about the allergens triggering the condition. This leads

to a targeted and more effective treatment strategy.

Research into canine atopic dermatitis has led to the development of vaccines designed to prevent the condition or reduce its severity. These vaccines are now part of the product portfolio, offering a proactive approach to managing the disease.

Key Market Challenges

Misdiagnosis and Underdiagnosis

One of the fundamental challenges in the management of canine atopic dermatitis is the potential for misdiagnosis or underdiagnosis. Symptoms of this condition, such as itching, redness, and skin irritation, can overlap with other skin problems, making accurate diagnosis crucial. Failure to recognize atopic dermatitis can lead to inappropriate treatments or a lack of intervention, further worsening the dog's condition.

Varied Triggers

Canine atopic dermatitis can have various triggers, including environmental allergens, food sensitivities, and genetic predisposition. Identifying the specific trigger for a particular dog can be challenging. This variability makes it difficult to develop a one-size-fits-all treatment, necessitating a more personalized approach to care.

Compliance and Duration of Treatment

Canine atopic dermatitis often requires long-term treatment and management. Ensuring that pet owners are compliant with treatment plans can be challenging. Compliance is influenced by factors such as the cost of treatment, the time and effort required, and the dog's response to treatment. The long duration of treatment may also lead to pet owner fatigue and non-compliance.

Key Market Trends

Immunotherapy Advancements

Immunotherapy, particularly allergen-specific immunotherapy (ASIT), is becoming more refined and accessible. The development of more precise allergy testing techniques and innovative ASIT treatments is expected to improve the management of atopic dermatitis by addressing the specific allergens responsible for each dog's condition.

Targeted Therapies

Advancements in pharmaceutical research are leading to the development of targeted therapies for canine atopic dermatitis. These therapies aim to address the underlying causes of the condition, providing a more comprehensive approach to treatment. Targeted therapies can reduce the need for long-term symptom management, enhancing the dog's quality of life.

Holistic and Alternative Therapies

Holistic and alternative therapies, such as acupuncture, herbal remedies, and physical rehabilitation, are gaining recognition as complementary treatments for atopic dermatitis. These therapies can enhance the overall well-being of affected dogs and provide additional options for pet owners seeking holistic approaches to management.

Segmental Insights

Product Insights

Based on the category of Product, Glucocorticoids emerged as the dominant revenue generator in 2022 due to increased usage and lower costs. Topical and oral forms of glucocorticoids were identified as the primary treatment option for managing canine atopic dermatitis, with oral medications like prednisone, prednisolone, and methylprednisolone being the preferred choices for treating acute flares. These oral forms also boast minimal side effects compared to other dosage methods.

Looking ahead, the Monoclonal Antibodies (MAbs) segment is poised for significant growth during the forecast period. This treatment approach is relatively new and has demonstrated high effectiveness. Zoetis introduced its first MAb in 2016, administered every four to eight weeks to provide immediate relief from itching. Furthermore, several MAbs are currently undergoing clinical trials, with positive results expected in the coming years.

Mode of Administration Insights

In 2022, the oral category secured the largest share of revenue due to its cost-effectiveness. Additionally, it offers greater convenience when compared to injectable and topical alternatives. This user-friendly aspect, where dog owners can self-

administer the medications, is further driving its demand.

On the other hand, the injectable segment is anticipated to experience robust growth in the projected period thanks to its effectiveness and potency. Injectable medications offer a rapid onset of action, which is expected to drive increased demand in the near future. Currently, veterinarians are recommending a combination of oral and injectable therapies for enhanced results, and the growth of the injectable segment is set to benefit from an extensive product pipeline.

Regional Insights

In 2022, North America established its dominance in the regional market and is poised to continue this trend throughout the forecast period. This growth can be attributed to several factors, including the rising incidence of canine atopic dermatitis in pet dogs, the introduction of new products, and a heightened concern among pet owners. The increasing rate of pet ownership is further propelling market growth. Additionally, major players in the industry are making substantial investments in the development of new drugs, which is expected to drive growth in the foreseeable future.

Latin America captured a significant market share due to the substantial population of pet dogs in the region. Notably, Brazil and Argentina are among the top 10 countries in the world with the highest number of pets. The Asia Pacific region is anticipated to exhibit substantial growth in the coming years. The rise in disposable income has increased the likelihood of higher adoption of companion animals, thereby expanding future growth prospects. Moreover, ongoing improvements in healthcare infrastructure are expected to offer the market significant growth opportunities in the forecast period.

Key Market Players

Zoetis Inc

Elanco Animal Health Inc

Virbac SA

Toray Industries Inc

AB Science SA

Boehringer Ingelheim GmbH

Kindred Biosciences Inc

Report Scope:

In this report, the Global Canine Atopic Dermatitis Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Canine Atopic Dermatitis Market, By Product:

Glucocorticoids

Antihistamines

Immunosuppressants

MAbs

Others

Canine Atopic Dermatitis Market, By Mode of Administration:

Topical

Oral

Injectable

Canine Atopic Dermatitis Market, By Distribution Channel:

Veterinary Hospitals/Clinics

Retail

E-commerce

Canine Atopic Dermatitis Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Canine Atopic Dermatitis Market.

Available Customizations:

Global Canine Atopic Dermatitis market report with the given market data, Tech Sci 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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