

Equine Healthcare Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Vaccines, Pharmaceuticals, Medicinal Feed Additives, Diagnostics, Software & Services, Others), By Indication (Musculoskeletal Disorders, Parasite Control, Internal Medicine, Equine Herpes Virus, Equine Encephalomyelitis, Equine Influenza, West Nile Virus, Tetanus, Others), By Activity (Sports/Racing, Recreation, Others), By Distribution Channel (Veterinary Hospitals & Clinics, E-commerce, Others), By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

Global Equine Healthcare Market has valued at USD 2.52 billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 5.94% through 2028. The global equine healthcare market refers to the industry dedicated to the health and well-being of horses. It encompasses a wide range of products and services designed to maintain and improve the health of horses, both for recreational and competitive purposes.

Key Market Drivers

Rising Participation in Equestrian Sports and Activities

Equestrian sports and activities have a rich history that spans centuries, from the historic races of ancient Greece to the modern arenas of Olympic dressage. What was once a niche interest has now evolved into a global phenomenon, with millions of enthusiasts participating in various equestrian disciplines. This surge in equestrian engagement is not only shaping the sports landscape but also driving the growth of the global equine healthcare market. As equestrian sports gain prominence, more people are investing in horse ownership. Whether for competitive riding, leisure, or companionship, this rise in horse ownership creates a significant demand for equine healthcare services and products. Horse owners, recognizing the need to ensure the health and well-being of their equine partners, are fueling the growth of the equine healthcare market. The growing equestrian community has fostered increased awareness of equine health and the importance of preventative measures. Horse owners, riders, and trainers understand that regular veterinary check-ups, vaccinations, and proper nutrition are essential to keeping their horses in peak condition. This heightened awareness drives the demand for equine healthcare solutions and encourages a proactive approach to horse care. Equestrian events, from local competitions to international championships, draw large audiences and participants. Events like show jumping, dressage, and rodeo have passionate followings, attracting riders and enthusiasts from around the world. These events generate substantial economic activity within the equestrian ecosystem, leading to increased investment in equine healthcare products and services. With the growth of equestrian sports comes a demand for specialized training and coaching. Trainers and coaches emphasize the importance of proper care and healthcare protocols for horses. This education not only ensures the well-being of the animals but also drives the use of equine healthcare products and services. The growth in equestrian sports has spurred technological advancements in equine healthcare. State-of-the-art diagnostic tools, digital imaging, and advanced treatment options are increasingly accessible, improving the quality of care for horses. These innovations are not only beneficial to the health of the animals but also attract horse owners seeking the best healthcare options for their equine companions. The equestrian world is incredibly diverse, encompassing a wide range of disciplines from racing to rodeo, eventing, and therapeutic riding. This diversity fosters a broad spectrum of equine healthcare needs, from managing injuries in racehorses to ensuring the well-being of therapy horses. The equine healthcare market is evolving to cater to the specific requirements of each discipline, further driving its growth.

Growing Awareness of Preventive Healthcare

In the world of equine health, prevention is not only better than cure; it's also an increasingly popular approach among horse owners and enthusiasts. As awareness of

the importance of preventive healthcare continues to grow, it is emerging as a potent driver behind the expansion of the global equine healthcare market. The modern horse owner understands that good health is paramount to their horse's well-being and performance. This mindset shift from merely treating illnesses to actively preventing them has led to a surge in demand for preventive healthcare products and services. As equine healthcare takes center stage, the market responds with a wider array of preventative options. Preventive healthcare often begins with regular check-ups and vaccinations. Horse owners now appreciate the importance of scheduling routine veterinary visits to catch potential health issues before they escalate. This proactive approach ensures that horses remain in the best possible condition and minimizes the need for costly treatments down the road. Proper nutrition plays a critical role in preventing health problems in horses. Owners are increasingly seeking guidance on nutrition tailored to their horse's specific needs. This has led to a growing market for equine supplements, including vitamins, minerals, and joint support products, to keep horses in optimal condition. Equine parasites can pose significant health risks if left unchecked. Horse owners are now well-informed about the importance of parasite control through regular deworming and fecal testing. As a result, the demand for effective parasite control products has surged. Dental health is an integral aspect of preventive care. Regular dental check-ups and proper dental care can prevent issues like malocclusions and tooth decay. Dentists specializing in equine dental care are in high demand, contributing to the growth of the equine healthcare market. Maintaining a horse's physical fitness is another preventive strategy. Many horse owners now invest in exercise and conditioning programs that not only improve performance but also help prevent injuries and health issues. The internet and access to information have empowered horse owners to become more educated about equine health. Online resources, forums, and educational materials have made it easier for horse owners to stay informed and make informed decisions about their horse's healthcare.

Technological Advancements in Diagnostics and Treatment

In the realm of equine health, innovation knows no bounds. With the rapid evolution of diagnostic tools and treatment technologies, the global equine healthcare market is galloping ahead like never before. This surge in technological advancements has not only transformed the landscape of equine medicine but also contributed significantly to the growth of this vital industry. One of the most significant benefits of technological advancements in equine healthcare is the improvement of diagnostic accuracy. State-of-the-art diagnostic tools, such as digital radiography, magnetic resonance imaging (MRI), and ultrasound, provide veterinarians with clear and precise images of a horse's internal structures. This allows for early detection of health issues, resulting in quicker and more

effective treatment, and ultimately reducing the risk of complications. In the digital age, telemedicine has become a game-changer in equine healthcare. Veterinarians can now offer consultations, monitor a horse's condition, and provide guidance remotely, saving time and improving access to expert care. This technology is particularly valuable for horse owners in remote areas or those facing logistical challenges. Technological advancements have also revolutionized equine surgery. Minimally invasive procedures, including arthroscopy and laparoscopy, have reduced the trauma and recovery time associated with traditional surgeries. Horses can return to their normal activities more swiftly, benefiting both their owners and the equine healthcare market. Regenerative medicine is another exciting frontier in equine healthcare. Treatments like stem cell therapy and platelet-rich plasma (PRP) have shown promise in accelerating the healing of injuries and degenerative conditions. These regenerative therapies offer new avenues for treatment and recovery, driving demand within the market.

Expanding Disposable Income

The world of equine healthcare is experiencing a transformation, driven in part by a significant and widespread trend: the expansion of disposable income. As economies prosper and individuals and families enjoy greater financial stability, horse ownership and participation in equestrian activities have become more accessible and affordable. This shift in economic dynamics is not only reshaping the equine landscape but also boosting the growth of the global equine healthcare market. Expanding disposable income has made horse ownership more achievable for a broader demographic. What was once a luxury reserved for a select few is now within reach for many individuals and families. This democratization of horse ownership has resulted in a surge in the number of horses worldwide, increasing the demand for equine healthcare products and services. As disposable income grows, so does the inclination to invest in recreational pursuits. Horses have transitioned from traditional roles in farming and transportation to becoming valued companions and recreational partners. This shift has led to greater expenditure on equine care, including preventive healthcare, nutrition, and veterinary services. With higher income levels, horse owners are more willing to invest in premium products and services for their equine companions. This includes high-quality feed and supplements, top-notch veterinary care, advanced diagnostics, and specialized treatments. As a result, the equine healthcare market has expanded to meet the demand for these premium offerings. Expanding disposable income has led to increased participation in equestrian sports and activities. Individuals and families can now afford riding lessons, horse training, and participation in competitive events. The more horses are involved in these activities, the greater the demand for equine healthcare solutions to ensure their performance and well-being. Higher disposable

income has shifted the focus from mere horse ownership to the well-being and longevity of equine companions. Horse owners are more willing to invest in preventive healthcare measures, regular check-ups, dental care, and nutritional plans to ensure their horses lead healthy, fulfilling lives.

Key Market Challenges

High Cost of Specialized Care

One of the foremost challenges in the equine healthcare market is the high cost associated with specialized care. Horses, unlike smaller companion animals, often require specialized veterinary services, medications, and equipment, all of which come at a premium. This can deter some horse owners from seeking proper care, potentially compromising the health of their animals.

Limited Availability of Skilled Veterinarians

Equine veterinarians are a specialized breed themselves, and their numbers can be limited in some regions. Finding qualified and experienced equine veterinarians can be challenging, especially in rural areas. This scarcity can lead to delays in care and potentially inadequate treatment.

Resistance to Change

Despite advancements in equine healthcare, some horse owners and trainers may resist adopting new practices or technologies. Tradition often plays a significant role in horse care, and convincing stakeholders to embrace innovation can be a gradual process.

Cost-Effective Alternatives

While some horse owners are willing to invest significantly in their animals' health, others may seek cost-effective alternatives. This can lead to the use of less proven or non-veterinary approaches to healthcare, potentially putting horses at risk.

Key Market Trends

Telemedicine and Remote Monitoring

Telemedicine is rapidly gaining traction in the equine healthcare industry. Horse owners and veterinarians are increasingly using digital platforms to facilitate remote consultations, monitor vital signs, and manage health records. This trend enhances convenience, reduces travel stress for horses, and allows for prompt assessment and intervention, particularly in remote areas.

Precision Medicine and Personalized Care

The equine healthcare market is moving towards a more personalized approach. Advances in genetics and diagnostics enable tailored treatments and nutrition plans for individual horses. Precision medicine ensures that each horse receives care specifically designed to meet its unique needs, optimizing health and performance.

Regenerative Therapies

Regenerative therapies, such as stem cell treatments and platelet-rich plasma (PRP) therapy, are gaining prominence in the equine healthcare sector. These innovative treatments offer the potential to accelerate healing, manage musculoskeletal issues, and improve overall well-being in horses. As research continues, regenerative therapies are likely to become more accessible and widely adopted.

Wearable Health Monitoring Devices

Wearable technology is making its mark in equine healthcare. Equipped with sensors and trackers, wearable devices monitor vital signs, movement, and behavior in real-time. These devices provide valuable data for veterinarians and horse owners to assess health, track performance, and detect issues early.

Segmental Insights

Product Insights

Based on the category of Product, the pharmaceutical industry held a dominant position in the market in 2022. Various types of pharmaceutical products designed for horses, including pain relievers, anti-infectives, anti-inflammatory drugs, and parasiticides, were widely used to address a range of equine health issues, such as reproductive, metabolic, infectious, and dermatological disorders. The market for both prescription and non-prescription medications experienced significant growth, driven by increased spending on equestrian activities and overall equine healthcare. This growth can be

attributed to the efforts made by industry players. For example, Zoetis offered a comprehensive selection of medications, including equine parasiticides like QUEST gel, Equest Pramox, Deosect 5% Spray Solution, and more.

Looking ahead, the 'others' category is expected to exhibit the highest growth rate from 2023 to 2030. This category encompasses regenerative treatments for horses, such as stem cell therapy, among others. The growth of this segment is anticipated to be fueled by increased research and development activities in the field of equine medicine. In June 2021, Zoetis introduced a range of devices, including Pro-Stride APS, CenTrate BMA, and Restigen PRP, designed to assist in the treatment of injuries in horses that can lead to lameness. These devices simplify the processing of horses' blood or bone marrow, eliminating the need for incubation or off-site preparation and enabling immediate use after centrifugation.

Indication Insights

In 2022, the dominant focus within the market was on controlling parasites. Parasiticides, which encompass treatments for both external parasites (ectoparasiticides) and internal parasites (endoparasiticides), were available in various forms such as sprays, collars, oral solutions, gels, and spot-on treatments. They could be administered through topical, oral, or intravenous methods and were effective in addressing health issues caused by amoebas, helminths, protozoa, and parasitic fungi.

Looking ahead, the segment related to equine influenza is expected to experience the most rapid growth during the forecast period. This growth can be attributed to the increasing prevalence of infectious diseases in horses. According to the OIE (World Organisation for Animal Health), there were more than 12,000 reported cases of equine influenza worldwide between 2017 and 2021. The demand for equine healthcare is on the rise due to mounting pressure to maintain the health of horses and optimize their performance, especially in the case of race and sports horses. Additionally, there is a growing awareness of the importance of preventive measures against equine diseases.

Regional Insights

In 2022, North America held the largest market share. According to data from the FAO (Food and Agriculture Organization), the United States alone had approximately 10.56 million horses in 2021, and the broader North American region boasted around 10.96 million horses. This substantial share was further bolstered by the presence of numerous horse farms and an extensive annual calendar of horse races. The United

States, for instance, boasts approximately 300 racetracks, hosting nearly 33,567 horse races each year. Additionally, the importation of an estimated 18,865 horses into the U.S. in 2021 contributed to the demand for equine healthcare in North America.

Looking ahead, the Asia-Pacific (APAC) region is projected to experience the most rapid growth during the forecast period. This growth can be attributed to several factors, including an increased demand for medicinal horse feeds, a rise in the prevalence of equine diseases, and government initiatives aimed at promoting equine health. Furthermore, the presence of numerous market participants operating in the equine products sector is expected to exert a significant influence on market growth in the coming years.

Key Market Players

Zoetis Inc.

Boehringer Ingelheim GmbH

Merck & Co., Inc.

Hallmarq Veterinary Imaging Ltd

Esaote SpA

Vetoquinol SA

IDEXX Laboratories, Inc.

Dechra Pharmaceuticals PLC

Report Scope:

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

Equine Healthcare Market, By Product:

Vaccines

Pharmaceuticals

Medicinal Feed Additives

Diagnostics

Software & Services

Others

Equine Healthcare Market, By Indication:

Musculoskeletal Disorders

Parasite Control

Internal Medicine

Equine Herpes Virus

Equine Encephalomyelitis

Equine Influenza

West Nile Virus

Tetanus

Others

Equine Healthcare Market, By Activity:

Sports/Racing

Recreation

Others

Equine Healthcare Market, By Distribution Channel:

Veterinary Hospitals & Clinics

E-commerce

Others

Equine Healthcare 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 Equine Healthcare Market.

Available Customizations:

Global Equine Healthcare 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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