

Flea and Tick Product Market - Global Industry Method, Share, Trends, Opportunity and Forecast, By Product Type (Chewable, Spot-On), By Pet Type (Dog, Cat, Others), By Method (Internal, External), By Distribution Channel (Online, Offline), By Region & Competition, 2021-2031F

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Abstracts

The Global Flea and Tick Product Market is projected to expand from USD 8.73 billion in 2025 to USD 14.92 billion by 2031, achieving a CAGR of 9.34%. This market comprises various chemical and pharmaceutical formulations, such as oral medications, medicated collars, and topical solutions, designed to control or eliminate external parasites on companion animals. A primary catalyst for this growth is the rising trend of pet humanization, where owners treat animals as family members deserving of regular preventive healthcare to avoid parasitic diseases. This demand is further supported by increasing pet adoption rates, which widen the customer base for veterinary-grade protection. According to the American Pet Products Association, total industry spending in the United States hit 152 billion dollars for the previous year in 2025, fueled by a record 94 million households owning at least one pet.

Despite these positive drivers, market expansion faces significant hurdles due to economic pressures on household budgets, which increase consumer price sensitivity. High inflation often forces pet owners to opt for lower-cost generic alternatives or delay treatments, thereby lowering sales volumes for premium products. This financial strain is exacerbated by a strict regulatory landscape for new chemical entities, which raises development costs and slows the commercial introduction of next-generation parasiticides.

Market Driver

Climate variations are reshaping the industry by expanding the seasonality and geographical range of parasites, serving as a critical external force for market growth. Rising global temperatures and altering precipitation patterns have prolonged the active breeding periods of ectoparasites, allowing vectors such as ticks and mosquitoes to flourish in areas that were previously inhospitable and necessitating year-round protection strategies. This shift in the environment drives volume growth as pet owners must administer preventatives for extended periods to lower disease risks. According to the Companion Animal Parasite Council's April 2024 '2024 Pet Parasite Forecast', surveillance data confirmed the southward spread of tick-borne pathogens, noting a Lyme disease prevalence rate of 44% in a sentinel county in northern North Carolina.

Concurrently, advancements in novel delivery systems and product formulations are boosting market value through the creation of broad-spectrum, convenient solutions. Manufacturers are moving away from traditional topical spot-ons toward palatable oral chews and combination therapies that address internal parasites, fleas, and ticks in a single dose, which improves compliance and supports premium pricing. This move toward comprehensive efficacy is reflected in the financial results of industry leaders. For instance, Zoetis reported in its November 2024 'Third Quarter 2024 Financial Results' that sales of the combination parasiticide Simparica Trio hit 268 million dollars, marking an operational growth of 30%. Similarly, demonstrating the ongoing demand for established oral innovations, Merck reported that third-quarter global sales for the Bravecto line totaled 266 million dollars in 2024.

Market Challenge

The growth of the Global Flea and Tick Product Market is significantly hindered by economic pressures on household budgets, which heighten consumer price sensitivity and modify purchasing habits. As high inflation restricts discretionary income, pet owners are forced to reevaluate veterinary spending, frequently viewing preventative parasiticides as optional rather than essential. These financial constraints result in lower adherence to recommended treatment schedules and prompt a transition toward less expensive generic alternatives. As a result, the market faces a reduction in the sales volume of premium branded formulations and a stagnation in overall revenue growth.

This pattern of financial caution is measurable across the broader veterinary sector, a vital distribution channel for these pharmaceutical products. Data from Animal Medicines Australia in 2025 indicates that approximately 18 percent of cat owners and

14 percent of dog owners deferred vaccinations, check-ups, or treatments because of financial limitations. Such interruptions in routine professional care directly break the consistent application of flea and tick solutions, thereby decreasing the frequency of product turnover and slowing the market's commercial momentum.

Market Trends

The rise of Direct-to-Consumer subscription models is fundamentally transforming distribution channels within the Global Flea and Tick Product Market by emphasizing recurring revenue and convenience over traditional veterinary purchasing. Pet owners are increasingly skipping clinical retailers in favor of digital auto-replenishment services that guarantee consistent parasiticide adherence without the need for repetitive transactions or physical store visits. This structural evolution not only secures cash flow for major retailers but also directly mitigates compliance gaps by automating the delivery of preventative treatments. According to Chewy's 'Third Quarter 2024 Financial Results' released in December 2024, Autoship subscription revenue increased by 8.7 percent year-over-year to 2.3 billion dollars, now comprising 80 percent of the company's total net sales.

At the same time, a surge in demand for natural and plant-based formulations is reshaping product innovation, as toxicity concerns regarding conventional synthetic chemicals push consumers toward botanical alternatives. Owners are actively searching for "clean label" parasiticides that use plant-derived compounds and essential oils to reduce the risk of adverse reactions in sensitive animals. This segment has evolved from a niche category into a rapidly expanding commercial force, driving manufacturers to scale up production for non-toxic solutions. According to Wondercide's May 2024 announcement regarding their headquarters relocation due to double-digit growth, sales for their plant-based pest control products have tripled over the past two years, requiring a quadrupling of manufacturing capacity to satisfy this growing consumer demand.

Key Market Players

Ceva Animal Health, LLC

Elanco Animal Health Incorporated

Virbac S.A.

Boehringer Ingelheim International GmbH

Eli Lilly and Company

PetIQ, LLC

The Hartz Mountain Corporation

Kittrich Corporation

Central Garden & Pet Company

Merck & Co., Inc

Report Scope

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

Flea and Tick Product Market, By Product Type

Chewable

Spot-On

Flea and Tick Product Market, By Pet Type

Dog

Cat

Others

Flea and Tick Product Market, By Method

Internal

External

Flea and Tick Product Market, By Distribution Channel

Online

Offline

Flea and Tick Product Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Flea and Tick Product Market.

Available Customizations:

Global Flea and Tick Product 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL FLEA AND TICK PRODUCT MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product Type (Chewable, Spot-On)
 - 5.2.2. By Pet Type (Dog, Cat, Others)
 - 5.2.3. By Method (Internal, External)
 - 5.2.4. By Distribution Channel (Online, Offline)

- 5.2.5. By Region
- 5.2.6. By Company (2025)
- 5.3. Market Map

6. NORTH AMERICA FLEA AND TICK PRODUCT MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Product Type
 - 6.2.2. By Pet Type
 - 6.2.3. By Method
 - 6.2.4. By Distribution Channel
 - 6.2.5. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Flea and Tick Product Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Product Type
 - 6.3.1.2.2. By Pet Type
 - 6.3.1.2.3. By Method
 - 6.3.1.2.4. By Distribution Channel
 - 6.3.2. Canada Flea and Tick Product Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Product Type
 - 6.3.2.2.2. By Pet Type
 - 6.3.2.2.3. By Method
 - 6.3.2.2.4. By Distribution Channel
 - 6.3.3. Mexico Flea and Tick Product Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Product Type
 - 6.3.3.2.2. By Pet Type
 - 6.3.3.2.3. By Method
 - 6.3.3.2.4. By Distribution Channel

7. EUROPE FLEA AND TICK PRODUCT MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Product Type

7.2.2. By Pet Type

7.2.3. By Method

7.2.4. By Distribution Channel

7.2.5. By Country

7.3. Europe: Country Analysis

7.3.1. Germany Flea and Tick Product Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Product Type

7.3.1.2.2. By Pet Type

7.3.1.2.3. By Method

7.3.1.2.4. By Distribution Channel

7.3.2. France Flea and Tick Product Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Product Type

7.3.2.2.2. By Pet Type

7.3.2.2.3. By Method

7.3.2.2.4. By Distribution Channel

7.3.3. United Kingdom Flea and Tick Product Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Product Type

7.3.3.2.2. By Pet Type

7.3.3.2.3. By Method

7.3.3.2.4. By Distribution Channel

7.3.4. Italy Flea and Tick Product Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

- 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Product Type
 - 7.3.4.2.2. By Pet Type
 - 7.3.4.2.3. By Method
 - 7.3.4.2.4. By Distribution Channel
- 7.3.5. Spain Flea and Tick Product Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Product Type
 - 7.3.5.2.2. By Pet Type
 - 7.3.5.2.3. By Method
 - 7.3.5.2.4. By Distribution Channel

8. ASIA PACIFIC FLEA AND TICK PRODUCT MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Product Type
 - 8.2.2. By Pet Type
 - 8.2.3. By Method
 - 8.2.4. By Distribution Channel
 - 8.2.5. By Country
- 8.3. Asia Pacific: Country Analysis
 - 8.3.1. China Flea and Tick Product Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Product Type
 - 8.3.1.2.2. By Pet Type
 - 8.3.1.2.3. By Method
 - 8.3.1.2.4. By Distribution Channel
 - 8.3.2. India Flea and Tick Product Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Product Type
 - 8.3.2.2.2. By Pet Type

- 8.3.2.2.3. By Method
- 8.3.2.2.4. By Distribution Channel
- 8.3.3. Japan Flea and Tick Product Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Product Type
 - 8.3.3.2.2. By Pet Type
 - 8.3.3.2.3. By Method
 - 8.3.3.2.4. By Distribution Channel
- 8.3.4. South Korea Flea and Tick Product Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Product Type
 - 8.3.4.2.2. By Pet Type
 - 8.3.4.2.3. By Method
 - 8.3.4.2.4. By Distribution Channel
- 8.3.5. Australia Flea and Tick Product Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Product Type
 - 8.3.5.2.2. By Pet Type
 - 8.3.5.2.3. By Method
 - 8.3.5.2.4. By Distribution Channel

9. MIDDLE EAST & AFRICA FLEA AND TICK PRODUCT MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Product Type
 - 9.2.2. By Pet Type
 - 9.2.3. By Method
 - 9.2.4. By Distribution Channel
 - 9.2.5. By Country
- 9.3. Middle East & Africa: Country Analysis
 - 9.3.1. Saudi Arabia Flea and Tick Product Market Outlook

- 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
- 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Product Type
 - 9.3.1.2.2. By Pet Type
 - 9.3.1.2.3. By Method
 - 9.3.1.2.4. By Distribution Channel
- 9.3.2. UAE Flea and Tick Product Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Product Type
 - 9.3.2.2.2. By Pet Type
 - 9.3.2.2.3. By Method
 - 9.3.2.2.4. By Distribution Channel
- 9.3.3. South Africa Flea and Tick Product Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Product Type
 - 9.3.3.2.2. By Pet Type
 - 9.3.3.2.3. By Method
 - 9.3.3.2.4. By Distribution Channel

10. SOUTH AMERICA FLEA AND TICK PRODUCT MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Product Type
 - 10.2.2. By Pet Type
 - 10.2.3. By Method
 - 10.2.4. By Distribution Channel
 - 10.2.5. By Country
- 10.3. South America: Country Analysis
 - 10.3.1. Brazil Flea and Tick Product Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast

- 10.3.1.2.1. By Product Type
- 10.3.1.2.2. By Pet Type
- 10.3.1.2.3. By Method
- 10.3.1.2.4. By Distribution Channel
- 10.3.2. Colombia Flea and Tick Product Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Product Type
 - 10.3.2.2.2. By Pet Type
 - 10.3.2.2.3. By Method
 - 10.3.2.2.4. By Distribution Channel
- 10.3.3. Argentina Flea and Tick Product Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Product Type
 - 10.3.3.2.2. By Pet Type
 - 10.3.3.2.3. By Method
 - 10.3.3.2.4. By Distribution Channel

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Merger & Acquisition (If Any)
- 12.2. Product Launches (If Any)
- 12.3. Recent Developments

13. GLOBAL FLEA AND TICK PRODUCT MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers

- 14.4. Power of Customers
- 14.5. Threat of Substitute Products

15. COMPETITIVE LANDSCAPE

- 15.1. Ceva Animal Health, LLC
 - 15.1.1. Business Overview
 - 15.1.2. Products & Services
 - 15.1.3. Recent Developments
 - 15.1.4. Key Personnel
 - 15.1.5. SWOT Analysis
- 15.2. Elanco Animal Health Incorporated
- 15.3. Virbac S.A.
- 15.4. Boehringer Ingelheim International GmbH
- 15.5. Eli Lilly and Company
- 15.6. PetIQ, LLC
- 15.7. The Hartz Mountain Corporation
- 15.8. Kittrich Corporation
- 15.9. Central Garden & Pet Company
- 15.10. Merck & Co., Inc

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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