

Middle East & Africa Veterinary Medicine Market, By Animal Type (Production Animal {Poultry, Sheep & Goats, Cattle, Others}, Companion Animal {Cats, Horses, Dogs, Others}), By Product (Biologics, Pharmaceuticals, Medicated Feed Additives), By Route of Administration (Oral, Injectable, Topical, Others), By Distribution Channel (Veterinary Hospitals & Clinics, E-commerce, Offline Retail Stores, Others), By Country, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Middle East & Africa Veterinary Medicine Market was valued at USD 920.75 Million in 2024 and is anticipated to project robust growth in the forecast period with a CAGR of 5.55% through 2030. Veterinary medicine encompasses a wide array of essential interventions to safeguard animal health and well-being. Among these are crucial drugs like anti-infectives and parasiticides, administered orally to combat infections and manage parasitic infestations. Additionally, vaccines play a pivotal role in veterinary medicine, bolstering immunity in animals against various viral diseases. Notable examples include equine influenza (EIV) and parainfluenza 3-respiratory syncytial virus, which can be particularly detrimental to equine populations. Medicated feed additives represent another vital facet, as they are incorporated into animal feed to confer medicinal benefits, ensuring optimal health and productivity. This comprehensive approach to veterinary medicine extends across diverse species. Companion animals like dogs and cats receive specialized care to promote their well-being and address specific health concerns. Simultaneously, veterinary medicine is indispensable in the

management of livestock animals, including cattle, pigs, and chickens. These efforts collectively contribute to the overall health, productivity, and longevity of animals, underlining the significance of veterinary medicine in sustaining both animal agriculture and companion animal ownership.

Key Market Drivers

Expansion of Livestock Farming

The expansion of livestock farming is a key driver of the growth of the Middle East & Africa (MEA) Veterinary Medicine Market. In the MENA region, poultry remains the leading meat of choice, followed by beef and sheep meat. Meat consumption patterns vary significantly across the region, with the Gulf countries reporting the highest per capita consumption, driven by their higher income levels and purchasing power. The region's population is projected to grow by 20% over the next decade—surpassed only by Sub-Saharan Africa—with the total population expected to exceed 500 million by 2031. This demographic surge is poised to amplify demand for meat, particularly in affluent markets, presenting substantial opportunities for the livestock and meat production industries. As the demand for animal-based products such as meat, dairy, and eggs continues to rise, particularly due to population growth, urbanization, and changing dietary patterns in the region, there is a corresponding need for veterinary solutions to ensure the health, productivity, and welfare of livestock. Riyadh | The livestock sector in Saudi Arabia accounts for approximately 43% of the nation's agricultural output, with small ruminants—primarily sheep and goats—making up the largest share, totaling around 23.5 million animals. As livestock farming scales up, so does the risk of disease outbreaks that can adversely affect animal health and the safety of food products. Diseases such as foot-and-mouth disease, avian influenza, and bovine tuberculosis pose significant threats to both livestock populations and public health. Consequently, there is a heightened demand for vaccines, antibiotics, antiparasitic drugs, and other veterinary medicines aimed at preventing, controlling, and eradicating these diseases. With the growth in the scale and intensity of livestock farming, farmers and livestock owners are more likely to invest in comprehensive veterinary care programs to protect the health of their herds and flocks.

Livestock farming in the MEA region is not just about maintaining healthy animals; it is also about optimizing productivity in terms of meat, milk, eggs, and other animal products. The use of veterinary medicines plays a crucial role in enhancing animal productivity. For example, growth-promoting hormones, nutritional supplements, and treatments for diseases that hinder growth are commonly used to improve the overall

performance of livestock. As the farming industry expands, more veterinary medicines are required to boost productivity, ensure optimal nutrition, and prevent diseases that can lead to loss of revenue. Larger-scale livestock operations necessitate improved biosecurity measures to prevent the spread of infectious diseases. Veterinary medicine plays a vital role in biosecurity protocols, offering a range of products such as vaccines, disinfectants, and antibiotics to safeguard animal health. In intensive farming systems, where animals are often housed in close quarters, the risk of disease transmission is high, making disease prevention and control a top priority. This drives demand for veterinary products designed specifically for large-scale operations, supporting the overall growth of the veterinary medicine market.

Between 2018 and 2022, South Africa emerged as Africa's leading exporter in three key agricultural categories: fruits and nuts, sugars and sugar confectionery, and beverages, spirits, and vinegar. Notably, beverages, spirits, and vinegar accounted for the largest share of African agricultural exports, contributing 70.6% of the total export value. Many countries in the MEA region, particularly those in Africa, have significant agricultural export markets, especially in the livestock sector. To meet international standards and comply with the stringent health and safety regulations of foreign markets, livestock producers must ensure that their animals are healthy and disease-free. This is achieved through the use of veterinary medicines such as vaccines, antibiotics, and anti-parasitic drugs, which are crucial for maintaining healthy livestock. As the export of animal products increases, the demand for veterinary products also rises to maintain the quality and safety of exported goods, further propelling the growth of the veterinary medicine market. Governments in MEA countries are increasingly recognizing the importance of livestock farming in ensuring food security and economic stability. As such, they are providing various subsidies, grants, and incentives to support the expansion of the agricultural sector, including livestock farming. In many cases, governments are also establishing veterinary care programs, encouraging farmers to adopt modern veterinary practices and products. This government support not only promotes the growth of livestock farming but also stimulates demand for veterinary medicines. For instance, vaccination programs funded by governments often lead to increased consumption of veterinary vaccines and pharmaceuticals by livestock farmers. The expansion of the middle class in many MEA countries, particularly in the Gulf Cooperation Council (GCC) nations, has led to changes in dietary habits, with a growing preference for meat-based diets. This has driven up demand for livestock products and, by extension, the need for more intensive livestock farming to meet this increased demand. As a result, veterinary medicine becomes a critical factor in ensuring that the growing livestock population remains healthy and productive. The shift towards high-quality animal-based products is also prompting farmers to invest in veterinary care to ensure their animals meet the

required health standards, further boosting the market for veterinary medicines.

Rising Occurrences of Zoonotic Diseases

The escalating incidences of zoonotic diseases among livestock animals in the Middle East and Africa have emerged as a significant driver behind the surge in demand for veterinary medicine. In Saudi Arabia, metacestode infections were recorded at varying prevalence rates across livestock, with 6% in camels in Al-Qassim, 14.9% in sheep, 29.5% in goats, and 3.1% in cattle, resulting in an overall infection rate of 11.3%. The incidence of hydatid disease in the country remains high and shows a concerning upward trend, posing significant challenges to animal health and livestock management. Zoonotic diseases, which are transmissible between animals and humans, pose a dual threat to both public health and the agricultural sector. Middle East Respiratory Syndrome (MERS) is a viral respiratory illness caused by the Middle East Respiratory Syndrome Coronavirus (MERS-CoV), first identified in Saudi Arabia in 2012. With a fatality rate of approximately 35% among reported cases, as per WHO data, MERS-CoV poses a significant public health concern. The virus is zoonotic, transmitting between animals and humans, with dromedary camels identified as a key reservoir linked to human infections across several countries in the Middle East, Africa, and South Asia. The close interaction between humans and livestock in these regions creates an environment conducive to disease transmission. Diseases like avian influenza, brucellosis, and Rift Valley fever, among others, can have severe consequences for both animal and human populations. As these zoonotic outbreaks continue to occur, there is a growing recognition of the need for comprehensive veterinary interventions. This includes not only the treatment of affected animals but also proactive measures such as vaccination campaigns, biosecurity protocols, and disease surveillance programs. Veterinary medicine plays a pivotal role in preventing, controlling, and managing these diseases within animal populations, thereby reducing the risk of human exposure. Furthermore, the economic ramifications of zoonotic outbreaks cannot be underestimated. Livestock farming is a cornerstone of many economies in the Middle East and Africa, providing livelihoods for millions of people. The occurrence of zoonotic diseases can lead to significant losses in livestock productivity, trade restrictions, and increased healthcare costs for affected individuals. This economic impact further underscores the critical role of veterinary medicine in safeguarding both public health and the economic stability of these regions. In response to this growing challenge, there has been an increasing focus on strengthening veterinary healthcare systems. This includes investments in veterinary education, training, and infrastructure, as well as the development and dissemination of evidence-based practices for disease prevention and management. By bolstering veterinary

medicine, the Middle East and Africa are taking proactive steps towards mitigating the risks associated with zoonotic diseases and ensuring the well-being of both animal and human populations.

Increasing Rising Awareness Among People Regarding Animal Health Propel the MEA Veterinary Medicine Market Growth

The Middle East and Africa have witnessed a notable upswing in the demand for veterinary medicine, propelled by the increasing awareness among people regarding animal health. This shift in perception reflects a growing recognition of the intrinsic link between animal well-being, public health, and economic stability. Livestock farming is a cornerstone of many economies in the region, providing livelihoods for a significant portion of the population. As such, the health and productivity of these animals are of paramount importance. The rising awareness among individuals about the importance of animal health can be attributed to several factors. Firstly, there is a heightened understanding of zoonotic diseases, which are illnesses that can be transmitted from animals to humans. Recent outbreaks of diseases like avian influenza and Ebola have underscored the critical need to monitor and safeguard the health of animals. This awareness has prompted individuals, communities, and governments to prioritize veterinary medicine as a means of preventing zoonotic diseases from spreading. Additionally, the shift towards urbanization and changing dietary preferences have contributed to the increased emphasis on animal health. As urban populations grow, there is a greater reliance on commercially produced animal products. This places a greater onus on ensuring the health and welfare of animals raised for food production. Consumers are now more conscious of the quality and safety of animal-derived products, driving the demand for effective veterinary medicine. Furthermore, the role of livestock in sustainable agriculture and food security cannot be overstated. Healthy animals are crucial for maintaining agricultural productivity, and veterinary medicine plays a pivotal role in achieving this. Farmers and agricultural stakeholders are increasingly recognizing the economic benefits of investing in animal health, as it directly impacts the yield and quality of agricultural products. In conclusion, the surge in demand for veterinary medicine in the Middle East and Africa is a testament to the growing awareness among people regarding the critical importance of animal health. This awareness spans from the prevention of zoonotic diseases to the promotion of sustainable agriculture and food security. As this trend continues to gain momentum, the veterinary medicine sector is poised for further growth and development, ultimately benefiting both animal welfare and the broader agricultural landscape.

Key Market Challenges

High Cost of Treatment

The high cost of treatment stands as a formidable challenge in the Middle East & Africa Veterinary Medicine Market. Limited access to affordable veterinary care poses significant hurdles for pet owners, livestock farmers, and animal welfare organizations alike. This financial barrier often results in delayed or inadequate treatment for animals, potentially exacerbating their health conditions. Moreover, expensive veterinary medications and procedures can strain the budgets of farmers and pet owners, impacting their ability to maintain healthy and productive animal populations. This challenge highlights the pressing need for initiatives that promote accessible and affordable veterinary care, ensuring the well-being of animals across the region. Addressing the high cost of treatment is essential in advancing the veterinary medicine market and, more importantly, in safeguarding the health and welfare of animals in the Middle East & Africa.

Lack of Skilled Professionals

The Middle East and Africa Veterinary Medicine Market grapples with a significant challenge - the high lack of skilled professionals in the field. This scarcity of qualified and experienced veterinarians and veterinary technicians hinders the delivery of quality healthcare to animals in the region. The shortage of skilled professionals is particularly acute in rural and remote areas, where access to veterinary services is already limited. This shortage not only affects the provision of routine care but also poses a critical barrier in times of disease outbreaks or emergencies. Additionally, it places additional strain on existing veterinary professionals, potentially leading to burnout and decreased quality of care. Addressing this shortage of skilled professionals is crucial to ensure the well-being of animals and to advance the veterinary medicine sector in the Middle East and Africa.

Key Market Trends

Technological Advancements

The Middle East and Africa Veterinary Medicine Market has experienced a significant boost, thanks to the burgeoning trend of pet ownership across the region. This surge in pet ownership has not only enriched the lives of individuals and families but has also spurred a heightened focus on animal health and well-being. One of the key drivers behind this trend is the evolving socio-economic landscape in the Middle East and

Africa. As disposable incomes rise and living standards improve, more families are embracing the idea of including pets as integral members of their households. Dogs, cats, and other companion animals are increasingly seen as sources of companionship, joy, and emotional support. The cultural shift towards pet ownership is also influenced by urbanization and changing lifestyles. In rapidly growing urban centers, the trend towards smaller living spaces and a more sedentary lifestyle has made companion animals particularly appealing. Pets offer a source of comfort, companionship, and entertainment in these settings, contributing to an overall improvement in the quality of life for pet owners. Moreover, there is a growing recognition of the therapeutic benefits that pets bring to their owners. Studies have shown that interactions with animals can reduce stress, anxiety, and depression, leading to improved mental and emotional well-being. This awareness of the positive impact of pets on human health has further fueled the desire for pet ownership. As the number of pet owners rises, so does the demand for veterinary services and products. Pet owners are increasingly invested in ensuring the health and longevity of their furry companions, driving the need for high-quality veterinary medicine. This includes vaccinations, preventive care, diagnostics, and a wide range of pharmaceuticals tailored to the unique needs of companion animals. The surge in pet ownership has also catalyzed advancements in veterinary medicine. The market has responded with innovative solutions, including specialized medications, advanced surgical techniques, and state-of-the-art diagnostic tools. This, in turn, has elevated the standard of care available to pets, mirroring the level of medical attention afforded to human family members.

Segmental Insights

Animal Type Insights

In 2024, the Veterinary Medicine market was dominated by the production animal segment and is predicted to continue expanding over the coming years. This segment is intricately divided into swine, poultry, cattle, fish, and sheep & goats. The substantial share commanded by production animals can be attributed to the growing global need for protein. Additionally, heightened investments in animal health, particularly in more developed regions, have propelled the widespread integration of production animal.

Product Insights

In 2024, the Veterinary Medicine market was dominated by the Pharmaceuticals segment and is predicted to continue expanding over the coming years. Vaccines are among the most widely used pharmaceutical products in veterinary medicine, and their

demand has skyrocketed in MEA due to the growing prevalence of animal diseases, particularly in livestock. Vaccines are essential for preventing a wide range of infectious diseases, such as foot-and-mouth disease, avian influenza, and rabies, which can have devastating effects on both animal populations and the agricultural economy. With the increasing scale of livestock farming and heightened concerns about food security, animal health, and zoonotic diseases, the demand for vaccines has become a critical component of veterinary care. The widespread use of vaccines ensures that animal populations remain healthy and productive, directly impacting the growth of the pharmaceutical segment.

The use of antibiotics and antimicrobials in veterinary medicine remains a cornerstone of the pharmaceuticals segment, particularly in the treatment of bacterial infections and the management of disease outbreaks. In MEA, where intensive livestock farming is prevalent, the need for antibiotics to treat infections in both companion animals and livestock is significant. These products are essential in preventing the spread of infectious diseases and maintaining the health of animals. The growing awareness of zoonotic diseases—diseases that can be transmitted from animals to humans—has further emphasized the importance of using antibiotics to control infections and safeguard public health. Additionally, with the rise of large-scale industrial farming, antibiotics play a vital role in ensuring that livestock remain healthy, driving the dominance of this category within the pharmaceutical segment.

Country Insights

The Saudi Arabia region has established itself as the leader in the Middle East & Africa Veterinary Medicine Market. The Saudi Arabia region has emerged as the frontrunner in the Middle East & Africa Veterinary Medicine Market due to several key factors. Firstly, Saudi Arabia boasts a robust and rapidly growing agricultural sector, with a substantial portion of the population engaged in livestock farming. This has led to a heightened awareness of the importance of animal health and the need for quality veterinary medicine. Moreover, Saudi Arabia places a significant emphasis on food security and self-sufficiency in agriculture. This has prompted substantial investments in livestock production and, consequently, in veterinary medicine. The government has implemented policies and initiatives to support the growth of the veterinary medicine sector, including research and development efforts. Additionally, Saudi Arabia has a well-established healthcare infrastructure, including veterinary hospitals, clinics, and laboratories, that provide advanced and comprehensive care for animals. The availability of state-of-the-art diagnostic and treatment facilities has positioned Saudi Arabia as a regional hub for veterinary services.

Key Market Players

Merck Animal Health

Dechra Veterinary Products

Bioveta Middle East FZ-LLC

Elanco

Boehringer Ingelheim Ltd.

MSD Animal Health

Virbac Group

VAPCO Manufacturing Co. Ltd.

Saudi Pharmaceutical Industries

United Company for Veterinary Medicines Industry

Report Scope:

In this report, the Middle East & Africa Veterinary Medicine Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Middle East & Africa Veterinary Medicine Market, By Animal Type:

Production Animals

Companion Animals

Middle East & Africa Veterinary Medicine Market, By Product:

Biologics

Pharmaceuticals

Medicated Feed Additives

Middle East & Africa Veterinary Medicine Market, By Route of Administration:

Oral

Injectable

Topical

Others

Middle East & Africa Veterinary Medicine Market, By Route of Distribution Channel:

Veterinary Hospitals & Clinics

E-commerce

Offline Retail Stores

Others

Middle East & Africa Veterinary Medicine Market, By Country:

Saudi Arabia

UAE

South Africa

Egypt

Algeria

Kuwait

Jordan

Tunisia

Morocco

Lebanon

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Middle East & Africa Veterinary Medicine Market.

Available Customizations:

Middle East & Africa Veterinary Medicine 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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