

Monoclonal Antibodies In Veterinary Health Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Animal Type (Dogs, Others), By Application (Dermatology, Pain, Others), End-User (Veterinary Hospitals, Others), By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

Global Monoclonal Antibodies In Veterinary Health Market has valued at USD 672.50 million in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 16.74% through 2028. The global monoclonal antibodies (mAbs) in veterinary health market represents a rapidly growing segment within the broader animal healthcare industry. Monoclonal antibodies, which are lab-engineered antibodies that can target specific antigens, are increasingly being adopted in veterinary medicine for their therapeutic and diagnostic applications.

Key Market Drivers

Rising Pet Ownership and Concern for Pet Health

The global pet industry is experiencing a transformation like never before, with pet ownership reaching record highs and an ever-growing concern for the health and well-being of our animal companions. This trend is not only reshaping the dynamics of the pet care sector but is also playing a pivotal role in propelling the growth of the global monoclonal antibodies (mAbs) in veterinary health market. The bond between humans and their pets has always been special, but recent years have witnessed a significant surge in pet ownership. People are increasingly welcoming pets into their homes,

whether they be dogs, cats, birds, or even exotic animals. This surge can be attributed to various factors, including changes in lifestyle, urbanization, and the recognition of pets as essential companions. With pets being considered a part of the family, owners are investing more than ever in their furry friends' health and well-being. They are willing to go to great lengths to ensure that their pets lead healthy, happy lives. This emotional attachment translates into a growing demand for advanced healthcare solutions, including monoclonal antibody therapies. As pet owners seek the best care for their companions, spending on veterinary services and products has increased substantially. This trend includes a willingness to explore cutting-edge medical treatments, such as monoclonal antibodies, to address a wide range of health issues in pets. The financial commitment to pet health is a significant driver for the growth of the veterinary mAb market. Monoclonal antibodies, initially developed for human healthcare, are now being adapted for veterinary use. These specialized antibodies can be customized to target specific diseases and conditions in pets, offering a level of precision and effectiveness that was previously unavailable. This expansion in the applications of mAbs is aligning perfectly with the increasing concern for pet health. Pet owners are increasingly focused on disease prevention rather than just treatment. Monoclonal antibodies are not only used for therapeutic purposes but also for the prevention of various diseases. This proactive approach to pet healthcare is driving the adoption of mAbs as a means to protect pets from common ailments.

Growing Demand for Safe and Effective Livestock Management

The global agriculture industry is evolving rapidly, driven by a growing global population's demand for safe and sustainable food sources. Alongside this transformation, there is an increasing emphasis on safe and effective livestock management practices. This shift in the agricultural landscape is not only vital for ensuring food security but is also driving the growth of the global monoclonal antibodies (mAbs) in veterinary health market. Consumers today are more concerned than ever about the safety and quality of the food they consume. This concern extends to the health and welfare of the animals raised for food production. Monoclonal antibodies are being employed to prevent and treat diseases in livestock, which not only enhances animal welfare but also ensures the safety and quality of animal-derived products. The growing awareness of animal welfare issues has led to a shift towards ethical and sustainable farming practices. Consumers are increasingly choosing products that are produced with consideration for the well-being of animals. Monoclonal antibodies play a role in these practices by helping to manage and mitigate diseases within livestock populations, reducing the need for aggressive antibiotic use, and promoting sustainable farming. Disease outbreaks in livestock can lead to substantial economic losses for

farmers and the agriculture industry as a whole. Monoclonal antibodies offer an effective tool for disease prevention and management, reducing the financial impact of diseases on the livestock sector. As a result, farmers are more inclined to invest in these innovative solutions. Healthy livestock are more productive, leading to increased yields of milk, meat, and other animal-derived products. Monoclonal antibodies can help boost livestock productivity by ensuring that animals remain healthy and disease-free. This, in turn, contributes to meeting the growing demand for animal protein. Regulatory agencies worldwide are recognizing the significance of monoclonal antibodies in livestock management. They are working to establish guidelines and approvals for these innovative treatments, providing assurance to farmers and veterinarians about their safety and efficacy. Regulatory support is a crucial driver for the adoption of mAbs in veterinary health.

Advancements in Biotechnology

The veterinary healthcare landscape is experiencing a transformative era, driven by significant advancements in biotechnology. In particular, these innovations are bolstering the expansion of the global monoclonal antibodies (mAbs) in veterinary health market. Biotechnology has revolutionized the development of monoclonal antibodies for veterinary applications. With precise molecular techniques and genetic engineering, researchers can design mAbs that target specific antigens or pathogens with unparalleled accuracy. This level of precision ensures the effectiveness of these antibodies in treating and preventing diseases in animals. Traditionally, the production of mAbs was a laborious and expensive process. Advancements in biotechnology have streamlined and scaled up the production of these antibodies. Techniques like recombinant DNA technology and improved cell culture methods have made it possible to produce monoclonal antibodies in larger quantities, driving down production costs and making them more accessible for veterinary use. Biotechnology enables the customization of monoclonal antibody therapies for individual animals. By tailoring mAbs to specific diseases or conditions in pets or livestock, veterinarians can provide personalized treatment regimens. This personalized approach enhances the efficacy of the treatments and reduces the risk of adverse reactions, ultimately improving animal health outcomes. The pace of research and development in biotechnology is remarkable. New discoveries and breakthroughs in this field occur regularly, leading to the rapid development of novel monoclonal antibody therapies. These advances expand the range of applications for mAbs in veterinary health, addressing a broader spectrum of diseases and conditions. Beyond therapeutic uses, biotechnology has facilitated the development of diagnostic monoclonal antibodies. These antibodies are designed to detect specific antigens or markers associated with diseases or health conditions in

animals. This enables earlier and more accurate disease detection, allowing veterinarians to initiate treatment or preventative measures promptly. Advancements in biotechnology have led to the development of safer and more reliable monoclonal antibody therapies. Regulatory agencies are recognizing the importance of these treatments and are actively working on establishing guidelines and approvals for veterinary use. These regulatory advancements provide confidence to veterinarians and pet owners in the safety and efficacy of mAbs.

Expansion of Applications

The global monoclonal antibodies (mAbs) in veterinary health market is undergoing a remarkable transformation, driven by the expansion of applications for these innovative therapies. Monoclonal antibodies, once primarily associated with human healthcare, are now finding diverse and promising applications in the realm of veterinary medicine. Traditionally, mAbs were employed primarily for therapeutic purposes in both human and veterinary medicine. However, their role has expanded to include diagnostic applications. Diagnostic monoclonal antibodies are designed to detect specific antigens or markers associated with diseases or health conditions in animals. This advancement allows for early disease detection and more accurate diagnoses, which can be crucial for effective treatment. In addition to therapeutic and diagnostic applications, mAbs are increasingly used for preventive medicine in veterinary health. These antibodies can be employed to boost an animal's immune system, making it more resistant to certain diseases. By providing prophylactic treatments, veterinarians can help prevent diseases in pets and livestock, contributing to overall health and reducing the economic impact of disease outbreaks. The expansion of mAb applications also involves targeting a wider range of animal species. Initially focused on companion animals such as dogs and cats, monoclonal antibodies are now being developed for livestock, including cattle, swine, and poultry. This expansion enables veterinarians and farmers to address health challenges across various animal populations. Monoclonal antibodies are proving effective in managing chronic conditions and autoimmune diseases in animals. Conditions such as arthritis, allergies, and inflammatory bowel disease in pets can be treated with these therapies. This expansion of applications is improving the quality of life for animals with long-term health issues. Biotechnology allows for the customization of mAb therapies for individual animals. Veterinarians can tailor monoclonal antibodies to target specific diseases or conditions in pets or livestock, ensuring that treatments are precisely matched to the needs of each animal. This personalized approach enhances treatment efficacy and minimizes potential side effects.

Key Market Challenges

High Development Costs

Developing monoclonal antibodies is a complex and expensive process. Research and development costs can be prohibitively high, which poses a significant challenge for smaller biotech companies and startups looking to enter the market. These high costs can limit the diversity of players and the range of mAb products available.

Lengthy Regulatory Processes

Regulatory approvals for veterinary monoclonal antibodies can be time-consuming and rigorous. Companies must demonstrate safety, efficacy, and quality before their products can reach the market. The lengthy regulatory processes can delay the availability of new therapies and deter investment in research and development.

Limited Awareness and Adoption

While the awareness of monoclonal antibodies in veterinary health is growing, there is still a need for education and outreach. Many veterinarians and pet owners may not be fully aware of the potential benefits of mAbs or may not understand how they can be integrated into existing treatment plans. Raising awareness and promoting adoption is an ongoing challenge.

Veterinary Drug Approval Pathways

The regulatory landscape for veterinary drug approvals varies by region and country. Navigating these different pathways and ensuring compliance with varying requirements can be daunting for companies seeking global reach. Harmonizing regulatory frameworks across regions is an ongoing challenge.

Key Market Trends

Expansion of Targeted Therapies

One of the most significant upcoming trends is the expansion of targeted therapies using monoclonal antibodies. As our understanding of animal diseases and their molecular mechanisms deepens, researchers are developing mAbs that can target specific disease pathways with precision. This trend promises to provide veterinarians with a broader range of effective treatment options for a variety of conditions.

Diagnostic Monoclonal Antibodies

The use of mAbs for diagnostic purposes is an emerging trend in veterinary healthcare. Diagnostic monoclonal antibodies are designed to detect specific antigens or markers associated with diseases or health conditions in animals. These innovative tools enable earlier and more accurate disease detection, enhancing the overall diagnostic capabilities of veterinarians.

Collaborative Research Initiatives

The veterinary healthcare industry is witnessing an increase in collaborative research initiatives between biotech companies, academic institutions, and veterinary professionals. These collaborations foster knowledge exchange, accelerate research and development, and pave the way for innovative mAb therapies. As interdisciplinary collaboration continues to grow, so does the potential for groundbreaking discoveries.

Adoption of Biosimilars

Biosimilars, which are highly similar versions of existing approved mAbs, are gaining traction in the veterinary health market. These cost-effective alternatives to branded monoclonal antibodies are becoming more readily available, offering veterinarians and pet owners more affordable treatment options without compromising quality or efficacy.

Segmental Insights

Animal Type Insights

Based on the category of Animal Type, the dog category dominated the market share, primarily due to the wider availability of monoclonal antibody products designed for dogs. Additionally, there has been a noticeable increase in the number of people keeping dogs as pets, accompanied by higher spending on their healthcare, which is contributing significantly to the market's expansion. According to statistics released by the Pet Food Manufacturers' Association in 2021, there were approximately 12 million pet dogs in the U.K., constituting 33% of households.

On the other hand, the 'others' segment is projected to experience the most rapid growth during the forecast period. This category encompasses animals such as cats, horses, and livestock animals. The growing incidence of various chronic ailments in

animals, coupled with the growing adoption of pet insurance, is expected to be a key driver of market growth. Moreover, data from the American Society for the Prevention of Cruelty to Animals reveals that in the United States, there are approximately 85.8 million pet cats, surpassing the number of pet dogs (78 million). In terms of pet ownership, this equates to 35% of households.

Application Insights

In 2022, the field of dermatology is projected to command the largest market share, primarily due to the availability of a diverse range of products within this category. Additionally, the increasing occurrences of conditions like atopic dermatitis and other infectious skin diseases in animals are poised to drive market expansion. According to a 2021 report published in Scientific Reports, the prevalence of *S. pseudintermedius* in both healthy and unwell cats in Poland stood at 2.49% and 7.61%, respectively. *S. pseudintermedius*, or *Staphylococcus pseudintermedius*, represents a bacterial infection seen in both dogs and cats.

On the other hand, the 'others' category is expected to experience the swiftest growth rate during the forecasted period. This category encompasses various diseases such as cancer, arthritis, and a range of infectious ailments, among others. The rapid growth in this segment is attributed to ongoing research and development efforts aimed at creating innovative treatment options. Furthermore, the pain management sector is also anticipated to capture a substantial market share in 2022, driven by the presence of a diverse array of products within this segment.

Regional Insights

In 2022, it is expected that North America will maintain its position as the dominant force in the global market. This is due to a combination of government and private sector initiatives, as well as a growing trend toward pet insurance. Additionally, the presence of major companies in the United States is likely to contribute to market expansion. According to the North American Pet Health Insurance Association, Inc., the pet insurance industry has experienced substantial growth, with a notable rate of 23.4% over the past few years. Moreover, as of the end of 2020, approximately 3.45 million pets were insured across North America.

Conversely, the Asia Pacific region is projected to exhibit the highest CAGR during the forecasted period. This growth can be attributed to the emergence of local players in the market, the increasing number of veterinary hospitals and clinics, and a rising trend in

pet ownership. Furthermore, heightened awareness regarding pet diseases and the availability of various treatment options are expected to further stimulate market growth in the Asia Pacific region.

Key Market Players

Zoetis Inc.

Merck & Co., Inc.

Elanco LLC

Boehringer Ingelheim GmbH

Indian Immunologicals Ltd

Virbac SA

Report Scope:

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

Monoclonal Antibodies In Veterinary Health Market, By Animal Type:

Dogs

Others

Monoclonal Antibodies In Veterinary Health Market, By Application:

Dermatology

Pain

Others

Monoclonal Antibodies In Veterinary Health Market, By End-User:

Veterinary Hospitals

Others

Monoclonal Antibodies In Veterinary Health 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 Monoclonal Antibodies In Veterinary Health Market.

Available Customizations:

Global Monoclonal Antibodies In Veterinary Health 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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