

# **Swine Vaccines Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028**

## **Segmented By Product (Attenuated Live Vaccines, DNA Vaccines, Inactivated Vaccines, Recombinant Vaccines, Subunit Vaccines), By Type (Actinobacillus Pleuropneumoniae, Classical Swine Fever, Foot & Mouth Disease, PEDV, Porcine Circovirus Type 2, Porcine Parvovirus, PRRS, Pseudorabies, Swine Influenza), By Target Disease (Arthritis, Bordetella Rhinitis, Diarrhea, Foot & Mouth Disease, Porcine Circovirus Associated Disease, Porcine Reproductive & Respiratory Syndrome, Pseudorabies, Swine Influenza), By Region, By Competition Forecast & Opportunities, 2018-2028F**

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### **Abstracts**

Global Swine Vaccines Market has valued at USD 1.32 billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 4.85% through 2028. The global swine vaccines market is a vital segment of the animal health industry that focuses on preventing and managing diseases in swine populations. Swine vaccines play a crucial role in ensuring the health and productivity of pigs in the swine farming sector, which is a significant component of the global meat industry.

### **Key Market Drivers**

## Rising Demand for Pork

The world's population is steadily increasing, and with it, the demand for protein-rich foods like pork is on the rise. As more people move to urban areas, their dietary preferences tend to shift towards meat-based diets. This urbanization trend amplifies the demand for pork products, leading to larger swine farming operations. To meet this burgeoning demand, farmers rely on swine vaccines to ensure the health and productivity of their herds.

Emerging markets in regions such as Asia, Latin America, and Africa are witnessing a rapid expansion of their middle-class populations. As incomes rise, so does the consumption of animal protein, including pork. This socio-economic shift is a major driver of increased demand for pork and, consequently, for swine vaccines. To meet the quality and safety standards demanded by this growing middle-class consumer base, swine farmers invest in disease prevention through vaccination.

Food security is a pressing concern in a world that needs to feed a growing population sustainably. Pork is an efficient source of protein, as pigs can convert feed into meat relatively quickly compared to other livestock. Ensuring the health and well-being of swine herds through vaccination is a key component of sustainable swine farming. Healthy pigs mean higher yields, reduced waste, and a more sustainable food supply chain.

Disease outbreaks in swine herds can lead to significant economic losses. Swine vaccines are essential tools for preventing and mitigating the impact of diseases such as porcine reproductive and respiratory syndrome (PRRS), swine influenza, and African swine fever (ASF). The ability to safeguard swine populations from these diseases not only protects the livestock but also ensures a stable and reliable supply of pork.

In an era where consumers are increasingly concerned about food safety and animal welfare, swine vaccines play a crucial role in reassuring consumers about the quality of pork products. Vaccination programs are seen as responsible and proactive measures by farmers and producers to maintain the health of their animals. This confidence in the quality and safety of pork products further bolsters consumer demand.

Advancements in biotechnology and vaccine development have resulted in the creation of more effective and safer swine vaccines. These innovations have improved disease prevention while minimizing the need for antibiotics and other treatments. The

availability of advanced vaccines enhances the attractiveness of swine farming and supports market growth.

## Disease Prevention and Management

Disease outbreaks in swine herds can result in devastating economic consequences. Swine diseases such as porcine reproductive and respiratory syndrome (PRRS), swine influenza, African swine fever (ASF), and foot-and-mouth disease can cause mass mortalities, reduced growth rates, and increased veterinary and treatment costs. Swine vaccines serve as a cost-effective and proactive measure to mitigate these economic losses by preventing diseases before they occur.

Sustainability in agriculture is a growing global concern, and the swine industry is no exception. Disease prevention through vaccination is a critical component of sustainable swine farming. Healthy swine herds are more efficient in terms of feed conversion and produce less waste, reducing the environmental footprint of pig farming. Swine vaccines enable farmers to practice responsible and sustainable animal husbandry.

Biosecurity measures alone are not always sufficient to prevent disease outbreaks in swine farms. The introduction of pathogens can occur through various vectors, including wildlife, transportation, and farm personnel. Swine vaccines complement biosecurity practices by providing an additional layer of protection. A well-structured vaccination program can significantly reduce the risk of disease introduction and spread.

In today's interconnected world, diseases can spread rapidly across borders. Globalization has increased the movement of people, animals, and goods, making the swine industry more susceptible to transboundary diseases. Swine vaccines play a vital role in controlling and containing these diseases, safeguarding the global pork supply chain.

Regulatory authorities in different countries have established guidelines and regulations governing the use of swine vaccines. Compliance with these regulations is not only a legal requirement but also essential for ensuring the safety and efficacy of vaccines. Farmers and producers are more likely to invest in vaccination programs that meet regulatory standards, further driving the growth of the swine vaccines market.

Consumers are becoming more conscious of food safety and animal welfare. Swine vaccines are viewed as a responsible and proactive means of maintaining the health and welfare of swine herds. A healthier pig population results in safer and higher-quality

pork products, meeting the demands of discerning consumers.

### Advancements in Vaccine Technology

Traditional vaccines often provide broad protection against a range of pathogens, but advancements in vaccine technology have enabled the development of more precise and targeted vaccines. This means that vaccines can be tailored to specific swine diseases, addressing the unique challenges faced by swine farmers. Precision in vaccination not only enhances disease prevention but also minimizes the potential for adverse reactions.

One significant advancement is the development of vaccines with reduced side effects. Modern vaccines are designed to be safer, with fewer adverse reactions in swine populations. This increased safety profile provides farmers and producers with more confidence in vaccinating their herds, leading to greater adoption of vaccination programs.

Advancements in vaccine technology have resulted in vaccines that are more effective in preventing diseases. Modern vaccines stimulate a stronger and longer-lasting immune response in swine, providing a higher level of protection against pathogens. Improved vaccine efficacy is essential in reducing disease-related losses and increasing the overall health of swine herds.

New vaccine delivery systems have made vaccine administration more convenient for farmers. These systems include oral vaccines, nasal sprays, and vaccines administered via drinking water, reducing the stress on animals and simplifying the vaccination process. As a result, farmers are more likely to incorporate vaccines into their herd management practices.

Advancements in biotechnology have accelerated the development of swine vaccines. The ability to identify and characterize swine pathogens more quickly allows for the rapid development of vaccines to combat emerging diseases or evolving strains. This agility is crucial in staying ahead of disease threats in the swine industry.

The swine industry faces constant challenges from evolving pathogens and emerging diseases. Advancements in vaccine technology allow for more timely updates and modifications to existing vaccines. This adaptability ensures that swine vaccines remain effective in an ever-changing disease landscape.

## Global Expansion of Swine Farming

The world's population continues to surge, particularly in regions like Asia, Latin America, and Africa. With this population growth comes an increased demand for protein-rich foods, including pork. Swine farming is an efficient way to produce high-quality protein, making it a key player in global food security. As swine herds expand to meet this demand, swine vaccines are essential for preventing diseases and ensuring a stable supply of pork.

Emerging economies are witnessing a significant rise in middle-class populations, leading to increased disposable incomes and changing dietary habits. In many of these regions, pork is a staple protein source. This shift towards a higher protein diet is driving the expansion of swine farming operations to meet the demands of this growing consumer base. Swine vaccines play a crucial role in protecting these valuable livestock assets.

Pork consumption patterns vary across the globe, influenced by cultural preferences and dietary habits. While pork is a dietary staple in some regions, it is considered a delicacy in others. Swine vaccines are equally relevant in both scenarios, as they help maintain herd health and prevent disease outbreaks, regardless of the scale of pork production.

Swine farming provides a livelihood for millions of people, particularly in rural areas of developing countries. As swine farming expands, it creates employment opportunities and economic growth in these regions. Disease prevention through vaccination is essential to protect the livelihoods of farmers and ensure the sustainability of swine farming as a source of income.

Globalization has facilitated the movement of goods and people, including the international trade of livestock and livestock products. However, it has also increased the risk of disease transmission across borders. Swine vaccines are vital tools in controlling and containing diseases, safeguarding global pork supply chains, and ensuring the safe movement of swine and swine products.

Consumer expectations regarding food safety and quality are on the rise. Swine vaccines play a crucial role in ensuring the health and welfare of swine herds, resulting in safer and higher-quality pork products. The use of vaccines is seen as a responsible and proactive measure by farmers and producers to meet these stringent standards.

## Key Market Challenges

### Emerging Diseases and Pathogens

The swine industry faces an ongoing threat from emerging diseases and evolving strains of existing pathogens. New diseases, such as African swine fever (ASF) and novel strains of influenza, can have devastating consequences for swine herds. Developing effective vaccines to combat these emerging threats is a constant challenge for vaccine manufacturers.

### Vaccine Safety and Efficacy

Ensuring the safety and efficacy of swine vaccines is paramount. Vaccine manufacturers must invest in rigorous testing and clinical trials to demonstrate the effectiveness and safety of their products. Developing vaccines with a high level of safety and minimal side effects is an ongoing challenge.

### Storage and Distribution Challenges

Maintaining the cold chain for vaccine storage and distribution can be challenging in some regions, especially in remote or less developed areas. Ensuring that vaccines reach their intended recipients in optimal condition is crucial for their effectiveness.

### Biosecurity Risks

Biosecurity breaches can lead to disease outbreaks within swine herds, rendering vaccination efforts ineffective. Controlling access to farms, proper quarantine procedures, and employee training are essential aspects of biosecurity, but they can be challenging to enforce consistently.

## Key Market Trends

### Precision Vaccination

One of the emerging trends in the swine vaccines market is precision vaccination. Traditional vaccines provide broad protection against a range of pathogens, but advances in vaccine technology now allow for more precise targeting of specific diseases. This trend helps swine farmers address unique disease challenges and reduce the potential for adverse reactions.

## Next-Generation Vaccine Platforms

The development of next-generation vaccine platforms is transforming the landscape of swine vaccination. These platforms include mRNA vaccines and viral vector vaccines, which offer improved safety, efficacy, and ease of administration. As research in these areas' advances, we can expect to see more innovative vaccine solutions tailored to swine health.

## Digitalization and Data-Driven Decisions

The integration of digital technology in swine farming, often referred to as 'smart farming,' is gaining momentum. Farmers are using sensors, data analytics, and real-time monitoring to track the health of their herds. This data-driven approach enables more precise vaccination timing and enhances overall disease management.

## Disease Surveillance and Monitoring

Surveillance and monitoring of swine diseases are crucial for early detection and containment. Advances in diagnostic tools, including rapid and cost-effective tests, are making it easier for swine farmers to identify diseases promptly, allowing for more effective vaccination strategies.

## Segmental Insights

### Product Insights

Based on the category of Product, the category of inactivated vaccines held a dominant position in the market and contributed the most substantial portion of revenue in 2022. This can be attributed to several factors, including their easy accessibility, cost-effectiveness, and stability advantages when compared to live-attenuated vaccines. Inactivated vaccines are effective in minimizing the risk of pathogens regaining virulence after vaccination since they halt the replication process of these harmful agents. Additionally, they offer swine enhanced immunization with a swift cell-mediated immune response. The immunity achieved through inactivated vaccines can be further bolstered by the inclusion of adjuvants like specific types of oils or aluminum hydroxide. However, it is crucial to exercise significant caution when preparing, storing, and handling inactivated vaccines to ensure their efficacy.

On the other hand, the segment dedicated to recombinant vaccines is projected to experience the most rapid growth rate during the forecast period. These vaccines are expected to play a pivotal role in achieving immunization against a wide array of virus strains, as they have the capability to carry multiple gene inserts. An example of such a swine recombinant vaccine is IngelvacCircoFLEX, developed by Boehringer Ingelheim International GmbH, which offers active immunization for pigs aged two weeks and older. Formulated vaccines of this nature can enhance stability, viability, and eliminate the need for adjuvants. Some of the available recombinant vaccines for swine target diseases such as pseudorabies, porcine circovirus type 2, and classical swine fever (CSF).

### Type Insights

Based on the category of Type, the PRRS (Porcine Reproductive and Respiratory Syndrome) category emerged as the dominant force in the market, securing the largest share of revenue in 2022. This can be attributed to its widespread occurrence in key swine-raising nations. PRRS manifests in both endemic and epidemic forms in the United States and select Asian countries. In the U.S., it has maintained epidemic status for over three decades, while in China, a leading player in the swine industry, it has been considered an epidemic for more than two decades. The significant genetic variability of the virus, stemming from common errors during RNA transcription, poses a formidable challenge in controlling the diversity of isolates, even within the same country.

Conversely, other swine diseases like ileitis, Glasser's disease, and neonatal diarrhea, among others, are projected to experience the highest CAGR during the forecast period. This growth is attributed to their high prevalence in swine herds located in developing economies. For instance, according to the CAB International organization, as of 2019, Glasser's disease had established a wide presence in various Asian, European, and American countries. Similarly, other disease outbreaks, such as erysipelas, occur separately in both acute and chronic forms or in a sequential manner, resulting in substantial economic losses. Specific vaccines tailored to each type of swine disease are available to effectively manage and control such outbreaks within farms.

### Regional Insights

In 2022, Asia Pacific secured the largest portion of revenue, and it is projected to experience the most rapid CAGR during the forecast period. Several key factors



contribute to this substantial market share. Notably, the region is home to major swine-producing nations, with China at the forefront. Additionally, the Asia Pacific region boasts a sizable population with a strong appetite for meat, driving a significant demand for vaccines to combat the increasing incidence of diseases among Asian swine herds. Furthermore, Asia had the highest pig population in 2021, numbering 462.6 million pigs, with China leading the pack with approximately 347 million pigs. Moreover, China's pork consumption reached 43,843 thousand tonnes in 2021.

In other regions such as Latin America, North America, and Europe, the swine vaccines market is also expected to witness substantial growth in the coming years. This growth can be attributed to the increasing swine population and the widespread adoption of biosecurity measures, including routine vaccination. North America, in particular, held a significant share of revenue in 2022. This is due to the region's well-established veterinary healthcare infrastructure, a growing demand for animal protein, highly organized farming practices, and an increased investment in animal health. Countries like the United States and Canada benefit from robust and well-defined healthcare systems and a concentration of key industry players.

### Key Market Players

Merck & Co Inc

Zoetis Inc

Boehringer Ingelheim GmbH

Elanco Animal Health Inc

Indian Immunologicals Ltd

Biogen

Phibro Animal Health Corp

Laboratorios HIPRA SA

Virbac SA

### Report Scope:

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

Swine Vaccines Market, By Product:

Attenuated Live Vaccines

DNA Vaccines

Inactivated Vaccines

Recombinant Vaccines

Subunit Vaccines

Swine Vaccines Market, By Type:

Actinobacillus Pleuropneumoniae

Classical Swine Fever

Foot & Mouth Disease

PEDV

Porcine Circovirus Type 2

Porcine Parvovirus

PRRS

Pseudorabies

Swine Influenza

Swine Vaccines Market, By Target Disease:

Arthritis

Bordetella Rhinitis

Diarrhea

Foot & Mouth Disease

Porcine Circovirus Associated Disease

Porcine Reproductive & Respiratory Syndrome

Pseudorabies

Swine Influenza

Swine Vaccines 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 Swine Vaccines Market.

## Available Customizations:

Global Swine Vaccines 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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