

U.S. Animal Health Market By Product (Biologics, Pharmaceuticals, Medicinal Feed Additives, Others), By Animal Type (Production Animals, Companion Animals), By Route of Administration (Oral, Injectable, Intravenous, Topical, Others), By Disease (Porcine Diseases, Poultry Diseases, Cattle Diseases, Aquaculture Diseases, Others), By Distribution Channel (Retail, E-Commerce, Hospital/ Clinic Pharmacy), By Region, Competition, Forecast and Opportunities, 2020-2030F

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Abstracts

U.S. Animal Health Market was valued at USD 12.53 Billion in 2024 and is expected to reach USD 19.92 Billion in the forecast period with a CAGR of 8.01% through 2030. The U.S. Animal Health Market has seen steady growth due to several key drivers that have shaped its evolution over recent years. The increasing number of pet owners, especially among millennials and Generation Z, has created a demand for enhanced veterinary care and pet-related products. This trend has led to an increase in the purchase of preventive healthcare products like vaccines, supplements, and parasite control treatments. As more households opt for pets as companions, the market for pet care products, including pharmaceuticals, is experiencing significant expansion. Furthermore, the growing trend of treating pets as family members has pushed for higher spending on healthcare services, contributing to market growth.

Rising awareness of zoonotic diseases and the importance of animal health in food production is propelling further market expansion. The increasing consumption of

animal-derived products, coupled with the expansion of livestock industries, has spurred demand for effective livestock management and disease prevention. Farmers and veterinarians are investing in modern diagnostic tools and vaccines to ensure healthier herds, addressing issues like livestock infections that could impact production and trade. Advancements in genetic research, biotechnology, and immunology are driving innovations in animal treatments, including personalized medicine and disease management solutions. This growing integration of advanced technologies in animal healthcare is expected to fuel market growth in the coming years.

However, the market faces challenges related to regulatory hurdles, rising production costs, and concerns regarding the environmental impact of large-scale animal farming. Regulatory approvals for new animal health products often require long timelines and substantial investment, which can delay product launches. Furthermore, farmers and pet owners are increasingly looking for cost-effective alternatives, which can create pricing pressure on companies. Despite these obstacles, opportunities abound in the areas of digital health technologies, telemedicine, and the growing demand for organic and plant-based pet food products. The continued emphasis on preventive healthcare and the increasing focus on sustainability in the agriculture sector are also expected to shape the market's future trajectory.

Key Market Drivers

Increasing Pet Ownership and Spending

Increasing pet ownership and spending is a key driver of the U.S. Animal Health Market. As pets are increasingly viewed as family members, especially among millennials and Generation Z, there has been a significant shift in how pet owners approach animal care. People are willing to allocate more resources toward ensuring the health and well-being of their pets, which has led to a surge in demand for veterinary services, medications, nutritional products, and preventive care. This trend is particularly evident in urban areas, where pet ownership is on the rise and people are more inclined to invest in high-quality healthcare solutions for their pets. Pet owners are increasingly seeking advanced treatments, wellness products, and specialized services to address a wide range of health issues, from chronic conditions to routine care needs.

The rise in pet spending is also driven by the growing awareness of the importance of preventive healthcare. Pet owners are more focused on maintaining their pets' health through regular veterinary visits, vaccinations, parasite control, and health supplements. This has created a strong demand for products that promote long-term health, such as

pet-specific nutritional supplements, grooming items, and wellness-focused food products. In the face of an aging pet population, owners are also seeking products that support joint health, dental care, and cognitive function, which further boosts spending in the sector.

This increasing commitment to pet care is not limited to just medical treatments; pet owners are also spending more on pet insurance, which has become a growing trend in providing financial security for veterinary costs. As pet ownership continues to rise, along with a growing willingness to invest in animal healthcare, the U.S. Animal Health Market is positioned for sustained growth.

In the U.S., the number of pet owners reached 70% of households in 2023, with more than 90 million pet dogs and 94 million pet cats. This has been accompanied by a steady increase in pet-related spending, which hit USD 32.3 billion for veterinary care in 2022, according to the American Pet Products Association. This growing trend is expected to continue, further fueling the demand for animal health services and products.

Rising Demand for Animal-Derived Food Products

The rising demand for animal-derived food products is a significant driver of growth in the U.S. Animal Health Market. In 2022, per capita meat consumption in the United States was approximately 98.9 pounds, with projections indicating an increase to around 107.5 pounds per capita by 2033. This growing demand places greater emphasis on maintaining the health of livestock to ensure a consistent and high-quality food supply. In response, livestock farmers are increasingly focusing on animal health to improve productivity, reduce disease outbreaks, and uphold high food safety standards. Ensuring the well-being of livestock is essential to meet the growing demand for these products while maintaining efficiency in production processes.

In addition, the U.S. agricultural sector is undergoing modernization, with many farmers adopting advanced animal health technologies such as precision livestock farming (PLF) systems. These technologies help monitor the health and behavior of animals in real-time, allowing for early detection of diseases, improving animal welfare, and minimizing the need for antibiotics and other treatments that can affect food safety and quality. These health monitoring systems ensure the productivity of livestock and prevent losses due to disease outbreaks, which could significantly disrupt food supply chains.

Consumers are also increasingly demanding healthier, more ethically produced food, further driving the need for high-quality animal health management practices. With concerns about foodborne illnesses and antibiotic resistance, there is growing interest in ensuring that animals are treated humanely, disease-free, and raised without excessive use of antibiotics. The focus on better disease management, biosecurity, and prevention measures directly correlates with improving the overall health of livestock, which contributes to meeting the rising demand for animal-derived food products. This trend continues to propel growth in the animal health sector as farmers invest in advanced health management solutions for their livestock.

Government Regulations and Support

Government regulations and support play a crucial role in driving the growth of the U.S. Animal Health Market. The U.S. government has established a range of policies aimed at ensuring the safety, health, and welfare of animals, which in turn promotes the use of veterinary services and animal health products. Regulatory frameworks, such as those enforced by the U.S. Food and Drug Administration (FDA) and the U.S. Department of Agriculture (USDA), govern the approval and usage of veterinary drugs, biologics, and vaccines. Stringent guidelines ensure that only safe and effective products reach the market, fostering consumer confidence in the industry. As regulations become more comprehensive, they also create a favorable environment for companies to innovate and develop new treatments that comply with these standards. In 2022, the FDA approved several new animal drugs, including the first safe and effective drug to control pain associated with osteoarthritis in dogs, highlighting the agency's commitment to enhancing animal health through stringent regulatory processes.

The U.S. government has also introduced programs to support the agricultural and livestock sectors, which drive demand for animal health products. Federal support in the form of subsidies, grants, and research funding is helping livestock farmers implement better disease management practices and invest in technologies that improve animal health. In fiscal year 2022, the National Institutes of Health (NIH) allocated approximately USD 5.5 billion to support animal research, underscoring the federal commitment to advancing veterinary science and ensuring the safety and efficacy of animal health products. Such support encourages the adoption of biosecurity measures, disease prevention programs, and vaccinations to ensure the overall health of livestock, ultimately boosting market demand for animal health solutions.

The government's increasing focus on combating antimicrobial resistance (AMR) has also contributed to the growth of the market. Regulations aimed at reducing the use of

antibiotics in livestock production have driven the development of alternative treatments and preventive solutions, such as vaccines and immunotherapies. In 2022, the FDA funded a USD 500,000 cooperative agreement to collect information about animal diseases most significant for antimicrobial use, promoting the development of alternative practices to reduce reliance on such drugs. These regulatory pressures are pushing innovation within the animal health industry, leading to a rise in demand for non-antibiotic-based health solutions, which continues to fuel market expansion.

Key Market Challenges

High Costs of Veterinary Care and Products

The high costs of veterinary care and products represent a significant challenge for the U.S. Animal Health Market. Veterinary services and medications can be expensive, creating financial barriers for many pet owners, especially those with lower incomes. For companion animals, the costs associated with routine checkups, surgeries, diagnostics, and specialized treatments can quickly add up, leading some owners to delay or forgo necessary care. This is particularly problematic for chronic conditions, where ongoing treatments are required. The rising costs of pet care have led to concerns about affordability, which is further compounded by the increasing demand for advanced treatments and biologics, which are often more expensive than traditional pharmaceutical products.

In the livestock sector, farmers face similar challenges. The cost of veterinary care for livestock, including preventive treatments, vaccinations, and disease management, can strain the financial resources of small and medium-sized operations. The expense of animal health products, such as vaccines and antibiotics, has risen, largely due to the continuous innovation in drug development and the rising prices of raw materials. This puts pressure on farmers, especially in a competitive market where maintaining profitability is critical. While larger commercial farms may absorb these costs more easily, smaller operations may struggle to invest in advanced animal health management solutions, potentially impacting their productivity and the quality of the food supply.

The high cost of veterinary care and products also extends to research and development for new treatments. As the demand for novel therapies and biologics grows, so does the financial burden on companies involved in the production of these products. This can lead to higher prices for consumers and a limited market reach, especially for underserved regions or low-income consumers. These factors collectively

pose a significant challenge to the U.S. Animal Health Market.

Regulatory and Approval Challenges

Regulatory and approval challenges present a significant hurdle in the U.S. Animal Health Market. The approval process for veterinary drugs, vaccines, and other animal health products is highly complex and time-consuming, requiring compliance with stringent regulations set by agencies like the U.S. Food and Drug Administration (FDA) and the U.S. Department of Agriculture (USDA). These regulations are designed to ensure the safety, efficacy, and quality of animal health products, but the rigorous testing, clinical trials, and documentation needed to gain approval can be costly and lengthy. This extended approval timeline can delay the availability of much-needed treatments and limit the ability of manufacturers to quickly respond to emerging diseases in animals.

The challenges in regulatory approval are exacerbated by the increasing complexity of modern animal health products, particularly biologics and genetically modified organisms (GMOs). The growing need for specialized products requires regulatory bodies to constantly update guidelines to keep pace with new innovations. The high cost of meeting these regulatory requirements can be a barrier for smaller companies, limiting competition and slowing innovation in the market. The process also involves navigating various state and federal regulations, which can create inconsistencies and further complicate the approval and distribution process.

Moreover, the regulatory landscape is becoming more stringent due to concerns about food safety, animal welfare, and antibiotic resistance. Stricter guidelines for the use of antibiotics in livestock and the growing focus on reducing the risk of drug residues in food products are forcing manufacturers to develop alternatives. These evolving regulatory requirements can pose significant challenges to market players, potentially leading to delays, increased costs, and a reduction in the number of new products entering the market.

Key Market Trends

Shift Toward Preventive Healthcare

The shift toward preventive healthcare is a significant trend in the U.S. Animal Health Market, reflecting a broader understanding of the long-term benefits of proactive health management for animals. Pet owners are becoming more proactive about preventing

health issues before they arise, focusing on wellness practices such as vaccinations, parasite control, and regular check-ups. This trend has led to increased spending on preventive products such as vaccines, flea and tick treatments, and dietary supplements. Veterinary clinics are adopting wellness programs that provide routine health assessments and encourage regular visits to catch potential health problems early, reducing the need for expensive and invasive treatments later.

In the livestock sector, farmers are increasingly investing in preventive measures to maintain animal health, reduce disease transmission, and improve overall productivity. By focusing on biosecurity measures and vaccination programs, farmers can prevent outbreaks that could severely impact both animal health and farm profitability. Technologies such as diagnostic tools, disease surveillance systems, and health-monitoring devices are helping identify health issues early, allowing for faster and more effective responses. The growing awareness of the economic benefits of preventing diseases rather than treating them has further contributed to the trend toward preventive healthcare.

This trend is fueled by a shift in consumer expectations, with a growing demand for healthier, ethically raised animals. Preventive healthcare practices are seen as a means to ensure the well-being of animals while also reducing the reliance on antibiotics and other treatments that could contribute to resistance or adverse health effects. As a result, the preventive healthcare market is expected to continue to grow, driven by increasing consumer awareness and the adoption of innovative health management solutions.

Personalized Medicine for Animals

Personalized medicine for animals is an emerging trend in the U.S. Animal Health Market, transforming the way veterinary care is approached. This trend is driven by advancements in genomics, biotechnology, and diagnostic tools, which allow veterinarians to tailor treatments to the specific needs of individual animals. Much like personalized medicine for humans, this approach focuses on understanding the genetic makeup, health history, and unique characteristics of each animal to deliver more targeted and effective treatments. Personalized medicine is particularly relevant for chronic conditions such as cancer, arthritis, and cardiovascular diseases in pets, where traditional one-size-fits-all treatments may not provide optimal outcomes.

Veterinary practices are increasingly utilizing genetic testing and molecular diagnostics to understand the underlying causes of diseases in animals. These technologies enable

the identification of genetic predispositions and help determine the most effective therapies based on an animal's genetic profile. Personalized medicine in veterinary care extends beyond pharmaceuticals to include personalized nutrition plans, tailored vaccines, and specific physical therapies that are designed to suit the individual health needs of each animal.

This trend is gaining traction as pet owners are more invested in their animals' long-term health and are seeking advanced, customized healthcare solutions. The growing acceptance of personalized care is driving demand for high-end veterinary services, such as specialized oncology treatments, immunotherapies, and genetic screening. The ability to provide targeted care improves treatment efficacy, reduces side effects, and enhances recovery times, making it a preferred choice for many pet owners. As awareness grows and technology becomes more accessible, personalized medicine for animals is expected to become a key trend in the U.S. Animal Health Market, offering a more sophisticated approach to animal health management.

Segmental Insights

Animal Type Insights

Based on the Animal Type, Companion Animals emerged as the dominant segment in the U.S. Animal Health Market in 2024. This is due to the growing trend of pet humanization, where pets are increasingly viewed as family members. This cultural shift has led to higher spending on pet health and well-being, as pet owners seek the best possible care for their animals. With over 67% of U.S. households owning a pet, the demand for veterinary services, pharmaceuticals, and preventive care products has surged. Pet owners are more willing to invest in advanced treatments, wellness products, and regular check-ups, reflecting the prioritization of pet health. The rise in pet ownership, particularly during the COVID-19 pandemic, has further fueled this trend, as more individuals and families have welcomed pets into their homes. Additionally, the aging pet population, with a higher incidence of chronic conditions such as arthritis, diabetes, and cancer, has led to increased demand for specialized treatments and therapies. As pets are living longer, the focus on preventive care and quality of life has become more important, driving growth in the companion animal health market. The expanding availability of advanced diagnostic tools, surgical procedures, and personalized medicine tailored to pets is also contributing to the sector's dominance in the U.S. Animal Health Market.

Disease Insights

Based on the Disease, Cattle Diseases emerged as the dominant segment in the U.S. Animal Health Market in 2024. This is due to the significant impact of cattle health on the agricultural economy. Cattle are a crucial source of meat, milk, and leather in the U.S., and any outbreak of disease can severely disrupt both production and supply chains. As a result, farmers and ranchers are increasingly investing in animal health solutions to prevent and manage diseases that can affect cattle, including bovine respiratory disease (BRD), mastitis, and foot-and-mouth disease. These diseases can not only impact the productivity of cattle but also lead to economic losses, making effective management crucial. The U.S. cattle industry is one of the largest in the world, with millions of cattle raised for beef and dairy production. The high stakes in this sector drive demand for advanced vaccines, diagnostic tools, and therapeutics aimed at preventing and treating diseases. The increasing adoption of precision livestock farming (PLF) technologies is also playing a role in improving disease management in cattle, as real-time monitoring systems help detect early signs of illness and reduce the spread of infections. As cattle farming becomes more technologically advanced, the focus on disease prevention and health management continues to grow, solidifying cattle diseases as the dominant segment in the U.S. Animal Health Market in 2024.

Regional Insights

The Mid-West region emerged as the dominant region in the U.S. Animal Health Market in 2024. This is due to its central role in the agricultural and livestock industries. The region, which includes key states such as Iowa, Nebraska, and Kansas, is a major hub for cattle, poultry, and swine farming. As one of the largest agricultural producers in the U.S., the Mid-West is highly dependent on animal health to ensure the productivity and sustainability of its livestock sector. The region's significant cattle population, combined with the growing demand for dairy and meat products, places a strong emphasis on maintaining animal health to prevent diseases that could disrupt production.

Farmers in the Mid-West are increasingly adopting advanced technologies, such as precision livestock farming (PLF), to monitor and manage animal health more efficiently. These innovations, along with a rising focus on biosecurity and disease prevention, are driving the demand for veterinary services, diagnostics, and therapeutics. Additionally, the Mid-West is home to a large concentration of veterinary schools, research institutions, and animal health companies, which are contributing to the development and dissemination of new animal health solutions. The combination of these factors positions the Mid-West as the dominant region in the U.S. Animal Health Market in 2024, with continued growth expected due to the region's vital role in the national

agricultural economy.

Key Market Players

Zoetis Inc.

Elanco Animal Health Inc.

Ceva Animal Health, LLC

Merck & Co., Inc.

VETOQUINOL S.A.

Boehringer Ingelheim International GmbH

Virbac S.A.

Phibro Animal Health Corporation

Dechra Pharmaceuticals Plc

Bimeda, Inc.

Report Scope:

In this report, the U.S. Animal Health Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

U.S. Animal Health Market, By Product:

Biologics

Pharmaceuticals

Medicinal Feed Additives

Others

U.S. Animal Health Market, By Animal Type:

Production Animals

Companion Animals

U.S. Animal Health Market, By Route of Administration:

Oral

Injectable

Intravenous

Topical

Others

U.S. Animal Health Market, By Disease:

Porcine Diseases

Poultry Diseases

Cattle Diseases

Aquaculture Diseases

Others

U.S. Animal Health Market, By Distribution Channel:

Retail

E-Commerce

Hospital/ Clinic Pharmacy

U.S. Animal Health Market, By Region:

North-East

Mid-West

West

South

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the U.S. Animal Health Market.

Available Customizations:

U.S. Animal Health 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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