

Middle East & Africa Veterinary Vaccines Market Size and Forecast (2021 - 2031)

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Abstracts

The Middle East & Africa Veterinary Vaccines Market is projected to grow significantly, reaching an estimated US\$ 486.1 million by 2031, up from US\$ 365.2 million in 2024. This growth represents a compound annual growth rate (CAGR) of 4.2% from 2025 to 2031, indicating a stable upward trend in the market.

Executive Summary and Market Analysis

The veterinary vaccines market in the Middle East and Africa encompasses key regions including Saudi Arabia, the United Arab Emirates (UAE), South Africa, and other areas within the region. The anticipated growth is primarily driven by the rising incidence of livestock diseases and proactive government initiatives aimed at enhancing animal health management. Saudi Arabia stands out as the largest market in the region, bolstered by advancements in its livestock sector and substantial investments in veterinary research and vaccine production.

Governments across the region are increasingly focusing on food security and animal welfare, leading to heightened capital investments and policy spending on vaccination systems. Additionally, there is a growing awareness among farmers and pet owners regarding preventive health measures and the importance of animal immunity, which is further driving vaccine uptake. South Africa and the UAE are emerging as significant markets as well, benefiting from improvements in veterinary healthcare infrastructure and technological advancements. Overall, government support and the rising demand for livestock health are expected to positively influence market trends throughout the region.

Strategic Insights

Market Segmentation Analysis

The Middle East & Africa Veterinary Vaccines Market can be segmented based on various criteria:

By Technology: The market is divided into Live Attenuated Vaccines, Inactivated Vaccines, Recombinant Vaccines, Toxoid Vaccines, and Others. In 2024, Live Attenuated Vaccines held the largest market share.

By Animal Type: The market is categorized into Companion Animals and Livestock & Poultry, with Livestock and Poultry dominating the market share in 2024.

By Companion Animal: This segment includes Dogs, Cats, Horses, and Others, where Dogs accounted for the largest share in 2024.

By Livestock and Poultry: This includes Chicken, Cattle, and Others, with Chicken leading the market share in 2024.

By Route of Administration: The market is segmented into Intramuscular, Subcutaneous, and Others, with Intramuscular administration holding the largest share in 2024.

By End User: This includes Veterinary Hospitals, Veterinary Clinics, and Others, where Veterinary Hospitals had the largest market share in 2024.

Market Outlook

Technological innovations are playing a crucial role in transforming the veterinary vaccine landscape, enhancing vaccine development, delivery, and overall effectiveness. New technologies such as recombinant DNA technology, vector-based vaccines, and mRNA platforms are revolutionizing the field, providing protection against chronic and life-threatening diseases. For instance, recombinant vaccines like the Merial PUREVAX series for cats eliminate the need for live pathogens while still offering robust immunity, thereby reducing the risk of adverse reactions.

The recent prominence of mRNA technology is also being explored for veterinary

applications, with companies like Elanco investing in research to develop next-generation animal vaccines. Innovations in vaccine delivery methods, including oral vaccines and needle-free injectors, are improving convenience and compliance among pet owners and livestock producers. An example of this is the oral rabies vaccine developed by Boehringer Ingelheim, which has been widely used in wildlife management initiatives, showcasing the potential for new delivery methods in the market.

Country Insights

The market is further segmented by country, with South Africa, Saudi Arabia, the UAE, and the Rest of the Middle East & Africa being key players. South Africa held the largest market share in 2024, driven by the presence of numerous national and international organizations dedicated to promoting animal health. The continent's vast population of livestock and companion animals necessitates effective animal healthcare management, supported by organizations such as The South African Animal Health Association and the World Organization for Animal Health.

In May 2023, the Vaccination Guidelines Group (VGG) of the World Small Animal Veterinary Association (WSAVA) initiated a project aimed at enhancing awareness of infectious diseases and the importance of vaccinating dogs and cats across Sub-Saharan Africa. This initiative also provides guidance to veterinarians on best vaccination practices.

Moreover, in June 2024, Gavi launched the African Vaccine Manufacturing Accelerator (AVMA), a funding initiative that aims to invest up to US\$ 1.2 billion over the next decade to support the sustainable development of Africa's vaccine manufacturing sector.

Company Profiles

Key players in the Middle East & Africa Veterinary Vaccines Market include Merck & Co. Inc., Boehringer Ingelheim International GmbH, Ceva Santé Animale, Zoetis Inc., Elanco Animal Health Inc., Virbac SA, Neogen Corp, Hester Biosciences Ltd, HIPRA SA, and Biovac LTD. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their product offerings and increase market share.

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