

North America Veterinary Vaccines Market Size and Forecast (2021 - 2031)

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Abstracts

The North America Veterinary Vaccines Market is projected to grow significantly, reaching an estimated US\$ 4,251.2 million by 2031, up from US\$ 3,064.3 million in 2024. This growth represents a compound annual growth rate (CAGR) of 4.8% from 2025 to 2031.

Executive Summary and Market Analysis

The veterinary vaccines market in North America is primarily divided into three regions: the United States, Canada, and Mexico. The United States dominates the market, holding the largest share, followed by Canada. Several factors are driving this market, including the increasing demand for veterinary vaccines from healthcare providers, enhanced government support for affordable healthcare services, and strategic initiatives by vaccine manufacturers aimed at improving service delivery. Additionally, the expanding healthcare industry is pushing for frameworks and guidelines based on real-world data to support their business models.

Strategic Insights

Market Segmentation Analysis

The North America Veterinary Vaccines Market can be segmented based on various criteria:

By Technology: The market includes 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 divided into Companion Animals and Livestock & Poultry, with Livestock and Poultry capturing the largest share in 2024.

By Companion Animal: This segment includes Dogs, Cats, Horses, and Others, with Dogs leading the market share in 2024.

By Livestock and Poultry: This includes Chicken, Cattle, and Others, where Chicken held the largest share in 2024.

By Route of Administration: The market is segmented into Intramuscular, Subcutaneous, and Others, with Intramuscular administration being the most prevalent in 2024.

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

Market Outlook

The increasing ownership of companion animals has led to a heightened awareness of pet health and preventive care, which in turn has driven the demand for vaccines that protect pets from infectious diseases. According to the American Pet Products Association (APPA), pet ownership in the U.S. rose from 67% in 2019 to 70% in 2022. As of 2024, approximately 59.8 million U.S. households owned dogs, and 42.1 million owned cats. The USDA reports that Latin America is a significant market for U.S.-imported dog and cat food, driven by economic growth, lower interest rates, and increased tourism, allowing consumers to spend more on pet care. Since the COVID-19 pandemic, pet ownership has surged, with the region importing US\$259 million worth of pet food in 2023, a 75% increase since 2020. The U.S. accounts for 40% of this market, alongside the EU and Mexico.

In September 2022, the World Health Organization (WHO) advocated for vaccination campaigns against zoonotic diseases like rabies, which can be transmitted from animals to humans. The WHO's initiatives to eliminate rabies through mass vaccination of dogs have encouraged vaccine acceptance in both developed and developing regions. The rise in pet ownership and the growing population of companion animals are critical drivers for the veterinary vaccines market, supported by changing societal attitudes towards pets, increased disposable income, and global efforts to control zoonotic

diseases. As the pet healthcare industry evolves, the demand for effective vaccines is expected to rise.

Country Insights

The North America Veterinary Vaccines Market is further analyzed by country, focusing on the United States, Canada, and Mexico, with the U.S. holding the largest market share in 2024.

Livestock groups provide essential products and services, including meat, milk, eggs, and fiber. Viral infections among livestock and companion animals pose significant challenges to animal health. Vaccination is crucial for preventing the spread of these viruses. For instance, foot-and-mouth disease (FMD) is a highly contagious viral disease affecting cloven-hoofed animals. Although the U.S. has been free of FMD for decades, outbreaks in other regions present ongoing risks. The U.S. government and agricultural sector are prepared to respond swiftly to any outbreaks, with vaccines playing a vital role in disease management.

In 2022, the U.S. Department of Agriculture's Animal and Plant Health Inspection Service (APHIS) invested approximately US\$ 42 million in FMD vaccine antigen concentrate from private companies, with an additional US\$ 30 million allocated in 2023. This funding supports the North American Foot-and-Mouth Disease Vaccine Bank, ensuring a ready supply of vaccines.

Moreover, the increasing pet ownership in the U.S. is driving demand for vaccinations for companion animals. According to the 2023-2024 American Pet Products Association Survey, 66% of U.S. households, equating to 86.9 million households, own a pet. The rise in research and development activities is also expected to propel the growth of the animal vaccines market in the coming years.

Company Profiles

Key players in the North America 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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