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Veterinary Biologics Market Size, Share and Growth Outlook 2026: By Product Type, By Animal Type, By Source, By Disease Type, By End-User, Companies to 2034

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Abstracts

The global Veterinary Biologics Market size is forecast to increase from $2.82 Billion in 2026 to $4.3 Billion in 2034 at a CAGR of 5.43% between 2026 and 2034.

The Veterinary Biologics market report provides detailed analysis and outlook of Veterinary Biologics segments including By Product Type (Vaccines, Monoclonal Antibodies, Immunomodulators, Allergenic Extracts, Bacterial Extracts, Antiserums), By Animal Type (Companion Animals, Livestock Animals, Others), By Source (Cell Culture, Inactivated Pathogens, Recombinant Technologies), By Disease Type (Bacterial Infections, Viral Infections, Parasitic Infections, Metabolic Disorders), By End-User (Veterinary Clinics and Animal Hospitals, Research Institutions, Farmers and Livestock Owners) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Veterinary Biologics Industry Overview

Advanced biologics and precision animal health are driving innovation across veterinary medicine.

The global veterinary biologics industry is expanding as manufacturers invest in innovative vaccines, immunotherapies, precision health technologies, and preventive biologics to address infectious diseases and chronic conditions affecting companion animals and livestock. Rising emphasis on disease prevention, emerging zoonotic

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threats, and precision livestock management is encouraging broader adoption of biologics supported by advanced genomics, automated vaccine delivery systems, and targeted therapeutic development. Companies are increasingly combining biotechnology, digital animal health, and high-throughput production capabilities to improve disease control while enhancing productivity and animal welfare across commercial farming and veterinary practice.

Strategic investments are strengthening preventive veterinary healthcare solutions.

Industry participants are expanding biologics portfolios through acquisitions, regulatory milestones, and precision animal health initiatives. Boehringer Ingelheim secured full U.S. FDA approval for VETMEDIN® formulations for delaying congestive heart failure in dogs with Stage B2 preclinical myxomatous mitral valve disease, supported by clinical evidence demonstrating significant extension in time to cardiac disease progression. Zoetis strengthened its precision animal health strategy through the acquisition of Neogen's animal genomics business while simultaneously collaborating with the National Oceanic and Atmospheric Administration and the USDA on emergency deployment of experimental avian influenza vaccine biologics to protect endangered Hawaiian monk seals. These developments illustrate the expanding role of biologics across both companion animal therapeutics and wildlife disease management.

Automation and biotechnology are improving vaccine delivery and production efficiency.

Manufacturers are increasingly integrating advanced engineering with biologics production to improve large-scale animal vaccination programs. Merck Animal Health expanded its poultry health capabilities through the acquisition of TARGAN, incorporating automated high-speed ocular spray and imaging technologies capable of vaccinating up to 160,000 day-old chicks per hour against respiratory diseases and coccidiosis. This reflects the industry's broader movement toward automated, precision-based biologics administration that improves operational efficiency while maintaining vaccination accuracy. Across the veterinary biologics industry, continued advances in vaccine technologies, genomics, automation, and preventive therapeutics are strengthening animal disease control and supporting the growing demand for precision veterinary healthcare.

Veterinary Biologics Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Veterinary Biologics market is witnessing increasing investments in

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innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Zoetis Inc., Merck Animal Health (Merck & Co., Inc.), Boehringer Ingelheim Animal Health Inc., Elanco Animal Health Incorporated, Virbac SA, Ceva Sant? Animale S.A., IDEXX Laboratories, Inc., Phibro Animal Health Corporation, HIPRA, Vetoquinol S.A.. The Veterinary Biologics market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Veterinary Biologics industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

Growth Veterinary Biologics Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

Market Trends, Drivers, Potential Opportunities, and Challenges faced by Veterinary Biologics companies

Porter’s Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

Detailed SWOT Analysis of global and regional Veterinary Biologics markets

Competitive analysis including business description, product analysis, and financial profiles

Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Veterinary Biologics Market Competitive Benchmarking and Company Analysis

Leading companies in Veterinary Biologics industry include- Zoetis Inc., Merck Animal

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Health (Merck & Co., Inc.), Boehringer Ingelheim Animal Health Inc., Elanco Animal Health Incorporated, Virbac SA, Ceva Sant? Animale S.A., IDEXX Laboratories, Inc., Phibro Animal Health Corporation, HIPRA, Vetoquinol S.A.. The Veterinary Biologics market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Veterinary Biologics Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach $8.2 Trillion in 2034 from $5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Veterinary Biologics market remains one of the strongest-performing segments in the country.

The US Veterinary Biologics Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Veterinary Biologics market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Veterinary Biologics industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Veterinary Biologics markets

Canada's strong Veterinary Biologics sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-

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sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Veterinary Biologics market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Veterinary Biologics Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Veterinary Biologics market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Veterinary Biologics population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Veterinary Biologics industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Veterinary Biologics market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Veterinary Biologics sales through 2034

France Veterinary Biologics companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were

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651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Veterinary Biologics Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Veterinary Biologics distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England’s plan to give more than 500,000 staff access to new AI tools.

China Veterinary Biologics Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Veterinary Biologics market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Veterinary Biologics industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China’s basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Veterinary Biologics industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Veterinary Biologics Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

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Indian Veterinary Biologics market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Veterinary Biologics market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Veterinary Biologics Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Veterinary Biologics Market Segmentation

By Product Type

Vaccines

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Monoclonal Antibodies

Immunomodulators

Allergenic Extracts

Bacterial Extracts

Antiserums

By Animal Type

Companion Animals

Livestock Animals

Others

By Source

Cell Culture

Inactivated Pathogens

Recombinant Technologies

By Disease Type

Bacterial Infections

Viral Infections

Parasitic Infections

Metabolic Disorders

By End-User

Veterinary Clinics and Animal Hospitals

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Research Institutions

Farmers and Livestock Owners

Leading Companies in Veterinary Biologics Industry (2026)

Zoetis Inc.

Merck Animal Health (Merck & Co., Inc.)

Boehringer Ingelheim Animal Health Inc.

Elanco Animal Health Incorporated

Virbac SA

Ceva Sant? Animale S.A.

IDEXX Laboratories, Inc.

Phibro Animal Health Corporation

HIPRA

Vetoquinol S.A.

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia, Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa,

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