

Veterinary Monoclonal Antibodies Market Size, Share and Growth Outlook 2026: By Animal Type, By Product Type, By Therapy Area, By Route of Administration, By End User, Companies to 2034

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Abstracts

The global Veterinary Monoclonal Antibodies Market size is forecast to increase from \$1.76 Billion in 2026 to \$4.42 Billion in 2034 at a CAGR of 12.21% between 2026 and 2034.

The Veterinary Monoclonal Antibodies market report provides detailed analysis and outlook of Veterinary Monoclonal Antibodies segments including By Animal Type (Dogs (Canine), Cats (Feline), Livestock Animals, Other Companion Animals), By Product Type (Anti-IL-31 Monoclonal Antibodies, Anti-NGF Monoclonal Antibodies, Immune-Modulating mAbs, Other Targeted mAbs), By Therapy Area (Dermatology (Atopic Dermatitis), Pain Management / Osteoarthritis, Infectious Diseases, Oncology, Other Therapeutic Areas), By Route of Administration (Injectable, Subcutaneous), By End User (Veterinary Hospitals and Clinics, Academic and Research Institutes, Others) 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 Monoclonal Antibodies Industry Overview

Targeted biologics, long-acting therapies, and manufacturing expansion are transforming veterinary monoclonal antibodies.

The global veterinary monoclonal antibodies industry is experiencing strong technological advancement as animal health companies expand targeted biologic

therapies for chronic pain, dermatological disorders, and other long-term diseases affecting companion animals. The market is increasingly moving toward highly specific immune-based treatments that provide sustained clinical benefits with reduced dosing frequency, improving treatment compliance for veterinarians and pet owners alike. Alongside therapeutic innovation, manufacturers are investing in dedicated biologics production capacity to support expanding commercial pipelines and growing global demand for veterinary monoclonal antibody therapies.

Novel monoclonal antibodies are expanding treatment options across veterinary medicine.

Manufacturers continue introducing biologic therapies that target disease-specific molecular pathways while providing prolonged therapeutic effects. Zoetis UK Ltd. received approval from the Veterinary Medicines Directorate (VMD) for Lenivia® (izenivetmab injection), a nerve growth factor (NGF)-targeting monoclonal antibody developed to alleviate pain associated with osteoarthritis in dogs, delivering relief for up to three months following a single injection. Expanding the application of monoclonal antibodies beyond pain management, Elanco Animal Health launched Befrena™ (tirnovetmab), an anti-IL-31 monoclonal antibody indicated for canine allergic and atopic dermatitis, providing sustained control of pruritus with dosing every 6 to 8 weeks. These therapies reflect the industry's broader transition toward long-acting biologics that improve quality of life while reducing treatment frequency.

Manufacturing investments are strengthening global biologics supply capabilities.

As veterinary biologic pipelines continue expanding, manufacturers are increasing production capacity to ensure reliable global supply. Zoetis reaffirmed its long-term commitment to veterinary monoclonal antibody manufacturing through continued investment in specialized production facilities located in Belgium and Ireland, while also confirming plans for a major new manufacturing site in Atlanta, Georgia to support global commercialization of its expanding monoclonal antibody portfolio. These investments demonstrate the industry's broader focus on strengthening biologics manufacturing infrastructure, enhancing supply chain resilience, and supporting continued innovation in targeted veterinary therapeutics across companion animal healthcare.

Veterinary Monoclonal Antibodies Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Veterinary Monoclonal Antibodies market is witnessing increasing investments in 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 & Co., Inc, Elanco Animal Health Incorporated, Boehringer Ingelheim Vetmedica GmbH, Virbac S.A., Ceva Santé Animale, Dechra Pharmaceuticals PLC, Invetx, Inc. (Dechra Group), Indian Immunologicals Ltd., Nextmune AB. The Veterinary Monoclonal Antibodies 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 Monoclonal Antibodies industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

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

Market Trends, Drivers, Potential Opportunities, and Challenges faced by Veterinary Monoclonal Antibodies 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 Monoclonal Antibodies 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 Monoclonal Antibodies Market Competitive Benchmarking and Company

Veterinary Monoclonal Antibodies Market Size, Share and Growth Outlook 2026: By Animal Type, By Product Type,...

Analysis

Leading companies in Veterinary Monoclonal Antibodies industry include- Zoetis Inc., Merck & Co., Inc, Elanco Animal Health Incorporated, Boehringer Ingelheim Vetmedica GmbH, Virbac S.A., Ceva Santé Animale, Dechra Pharmaceuticals PLC, Invetx, Inc. (Dechra Group), Indian Immunologicals Ltd., Nextmune AB. The Veterinary Monoclonal Antibodies 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 Monoclonal Antibodies 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 Monoclonal Antibodies market remains one of the strongest-performing segments in the country.

The US Veterinary Monoclonal Antibodies 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 Monoclonal Antibodies 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 Monoclonal Antibodies 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 Monoclonal Antibodies markets

Canada's strong Veterinary Monoclonal Antibodies 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-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Veterinary Monoclonal Antibodies 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 Monoclonal Antibodies 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 Monoclonal Antibodies 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 Monoclonal Antibodies population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Veterinary Monoclonal Antibodies 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 Monoclonal Antibodies market outlook.

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

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

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

Indian Veterinary Monoclonal Antibodies 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 Monoclonal Antibodies 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 Monoclonal Antibodies 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 Monoclonal Antibodies Market Segmentation

By Animal Type

Dogs (Canine)

Cats (Feline)

Livestock Animals

Other Companion Animals

By Product Type

Anti-IL-31 Monoclonal Antibodies

Anti-NGF Monoclonal Antibodies

Immune-Modulating mAbs

Other Targeted mAbs

By Therapy Area

Dermatology (Atopic Dermatitis)

Pain Management / Osteoarthritis

Infectious Diseases

Oncology

Other Therapeutic Areas

By Route of Administration

Injectable

Subcutaneous

By End User

Veterinary Hospitals and Clinics

Academic and Research Institutes

Others

Leading Companies in Veterinary Monoclonal Antibodies Industry (2026)

Zoetis Inc.

Merck & Co., Inc

Elanco Animal Health Incorporated

Boehringer Ingelheim Vetmedica GmbH

Virbac S.A.

Ceva Sant? Animale

Dechra Pharmaceuticals PLC

Invetx, Inc. (Dechra Group)

Indian Immunologicals Ltd.

Nextmune AB

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,
Other Africa

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Livestock Animals

Other Companion Animals

By Product Type

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Anti-NGF Monoclonal Antibodies

Immune-Modulating mAbs

Other Targeted mAbs

By Therapy Area

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Pain Management / Osteoarthritis

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Boehringer Ingelheim Vetmedica GmbH

Virbac S.A.

Ceva Sant? Animale

Dechra Pharmaceuticals PLC

Invetx, Inc. (Dechra Group)

Indian Immunologicals Ltd.

Nextmune AB

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