

Global Porcine Vaccine - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Global Porcine Vaccine Market size is estimated at USD 2.05 billion in 2024, and is expected to reach USD 2.95 billion by 2029, growing at a CAGR of 7.5% during the forecast period (2024-2029).

The sudden outbreak of COVID-19 majorly impacted all the markets. With the focus primarily shifted to combat COVID-19, all other research and development are on hold. In July 2020, the Center for Disease Control and Prevention (CDC) provided specific guidelines to veterinary professionals for treating animals during COVID-19. Many government agencies have also recommended prioritizing urgent and emergency visits to clinics and hospitals. Furthermore, most veterinary laboratories are actively involved in testing COVID-19 in humans to overcome the global shortage of healthcare facilities and COVID-19 testing laboratories, according to the OIE (World Organization for Animal Health). However, some hospitals and clinics are taking definite measures to avoid the transmission of the virus during this pandemic situation. Prestige Animal Hospitals, for example, has taken precautionary measures when treating animals. It also launched the 'Drop Off Exams' program, which allows owners to drop off their pets for diagnosis or treatment. The results and treatment plans are then discussed through a phone call/e-mail. As a result, the companion animal vaccine market is experiencing a slight short-term negative impact, owing to lower veterinary visits during COVID-19. Thus, COVID-19 is expected to impact the porcine vaccine market slightly.

Additionally, the growing R&D activities by the key players for discovering novel porcine vaccines to treat diseases and rising product approvals are expected to aid in the positive growth of the studied market over the forecast period. For instance, in May 2021, the Classical Swine Fever (CSF) vaccine was launched under the Raksha Class by Indian Immunologicals Limited (IIL) brand name. Thus, rising product launches anticipated market growth over the forecast period.

According to the Congress Budget Office report in April 2021, the pharmaceutical industry spent USD 83 billion on research and

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development. These costs were paid for various activities, including discovering and testing new drugs, developing incremental innovations like product extensions, and conducting clinical trials for safety monitoring or marketing purposes. Thus rising in R&D spending boosts the market over the forecast period.

PRRS (Porcine Reproductive and Respiratory Syndrome) is still a common disease in pig farms, causing financial losses due to its adverse effects on reproduction, growth, and clinical illness. As a result, market innovation to meet customer demand has been ongoing. For example, in April 2021, Ahmedabad-based company Hester Bioscience got the right to commercially produce classical swine fever and sheep pox vaccines in India. Scientists develop these two vaccines from the Indian Veterinary Research Institute (IVRI), Izatnagar, under the Indian Council of Agricultural Research (ICAR). Also, in April 2021, the Argentine laboratory Vetanco partnered with Pharmgate Animal Health to distribute the Circo/MycoGard vaccine in Argentina and Latin America. The vaccine protects pigs against both PCV-2 and *Mycoplasma hyopneumoniae*.

Thus, owing to the abovementioned factors, the market is expected to show growth over the forecast period. However, high expenses of maintaining and handling storage conditions and chance of reverse reaction from vaccines significantly hinder the market's growth.

Porcine Vaccines Market Trends

Porcine Circovirus Associated Disease is Expected to Witness a Healthy Growth

PCV (Porcine Circovirus) is the smallest non-enveloped, single-stranded DNA virus, which replicates autonomously in eukaryotic cells, using the host polymerase for genome amplification. PCV can be spread through direct contact with an infected pig. PCV2 is the single-stranded DNA (ssDNA) virus with the highest mutation and recombination rate of all single-stranded DNA (ssDNA) viruses. PCV is one of the most important infectious agents affecting pig productivity worldwide.

Furthermore, according to Henna's article published in MDPI Viruses in January 2021, the global prevalence and status of PCV have resulted in a seropositivity rate of 20-80% in pigs, as well as a very high incidence rate of 60%, with a culling rate of 40% in severely affected pig farms.

Commercially available PCVAD vaccines can be of many types, mainly based upon the dosage, packaging size, age of the pig it is used on, and virus type. Some of the major brands manufacturing and selling porcine vaccines for PCVAD, globally, are Boehringer Ingelheim, Merck, and Zoetis, among others. The first FLEX Family swine vaccine for PCV2 protection in a single injection was Ingelvac CircoFLEX, by Boehringer Ingelheim. Hence, it is one of the revolutionary PCV2 vaccines on the market.

Thus, the segment is anticipated to witness significant growth over the forecast period due to the abovementioned factors.

North America Holds a Significant Market Share

Increasing pork consumption, the growing prevalence of various swine diseases, and rising per capita animal healthcare expenditure are the factors the United States is expected to retain its large market share.

In the United States, advancements in vaccine development include the development of live vector vaccines, non-replicating recombinant antigen vaccines, nucleic acid-mediated vaccines, and live-gene-deleted vaccines. Moreover, technological advances in the vaccine field and well-established healthcare infrastructure are also considerably fueling the regional market's growth. For instance, in March 2022, Boehringer Ingelheim launched the porcine parvovirus vaccine ReproCyc ParvoFLEX which provides safe, efficacious protection for healthy sows and gilts six months of age or older against reproductive failure caused by porcine parvovirus.

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Furthermore, according to the Agricultural Economic Insights (AEI) report, meat consumption in the United States increased in 2020 when studied from 1970 to 2020. Although poultry, beef, and pork consumption pattern broadly vary, it increases the risk of swine diseases.

Thus, the market is expected to witness significant growth during the forecast period due to the abovementioned factors.

Porcine Vaccines Industry Overview

The porcine vaccines market is fairly competitive and consists of several major players including Hipra, Zoetis, Elanco Inc, Boehringer Ingelheim, and Vetoquinol. Most of these major players enjoy a global presence and are facing intense competition in emerging economies. The emerging countries are becoming hotspots for significant competition, due to a rapidly expanding market size, fueled by rising concerns over food safety and the increasing adoption of companion as well as farm animals.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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