Animal Vaccines Market Assessment, By Product [Attenuated Live Vaccines, Subunit Vaccines, DNA Vaccines, Recombinant Vaccines, Inactivated Vaccines], By Animal Type [Livestock Animal Vaccines, Companion Animal Vaccines], By Route of Administration [Subcutaneous, Intramuscular, Intranasal], By Distribution Channel [Veterinary Clinics, Veterinary Hospitals, Others], By Region, Opportunities and Forecast, 2017-2031F

Market Report | 2024-11-27 | 224 pages | Market Xcel - Markets and Data

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Report description:

Global animal vaccines market is projected to witness a CAGR of 5.44% during the forecast period 2024-2031, growing from USD 9.03 billion in 2023 to USD 13.80 billion in 2031. The market demand for animal vaccines is anticipated to thrive drastically in the forecast years due to the increasing prevalence of animal disease and the growing interest of investors and market players. Animals and humans are linked and bonded together because of various critical factors. Life is difficult without animals, but at the time, due to various internal and external factors such as disease-causing agents, animals are confronted with many disease-causing risks. The animal vaccine market represents an important segment of the veterinary business, focusing on the prevention of diseases in livestock and companion animals. Increasing animal disease incidence, growing global demand for animal protein, and advancing vaccine technology contribute to a strong demand for animal vaccines. According to the WorldHealth Organization (WHO), 60% of the known infectious diseases in humans can be transmitted by animals, and 75% of emerging infections in humans are transmitted from animals. The four main types of vaccines are live attenuated, inactivated, subunit, and emerging DNA vaccines, which apply to livestock-farming animals, including cattle, pigs, and poultry, and companion animals, like dogs and cats. For instance, in January 2024, Ceva Sante Animale announced the strategic acquisition of Scout Bio, a pioneering biotech committed to advanced therapies in companion animals. This represents a major innovation step forward for

Ceva in unlocking access to critical advances - including a pipeline of monoclonal antibodies and other gene therapy developments designed to treat chronic diseases in pets.

Increased Prevalence of Animal Diseases to Support the Growth of Animal Vaccines Market

Increasing animal disease prevalence is likely a significant growth driver for the global animal vaccines market. As the incidence of infectious and zoonotic diseases rises, the demand for effective preventive measures becomes more imperative. Avian influenza, foot-and-mouth disease, and canine distemper outbreaks present some of the most pressing and potent threats to animal health, food security, and public health. Since these diseases easily spread within and between populations, vaccination increasingly becomes a major strategy for mitigating risks and safeguarding livestock and companion animals. Increasing awareness of these diseases' economic and health implications incentivizes investment in vaccine development and distribution, therefore emphasizing the need for vaccination for healthy animal populations and sustainable agricultural practice. A growing incidence of animal diseases directly correlates with a strong demand for new, more effective vaccines, thereby causing rapid market growth. For instance, in February 2024, Penn Vet announced the launch of an mRNA research program to accelerate the development of veterinary mRNA-based vaccines and host-directed therapies targeting a diverse range of veterinary species. From avian influenza in poultry to viral infections in swine, the potential applications of mRNA-based vaccines are diverse. While mRNA vaccines are effective at producing antibody responses, they are not as effective at stimulating long-term lung, gut, and skin T cells necessary for barrier immunity in the majority of pathogens.

Advancements in Vaccines Technology to Increase Animal Vaccines Market Growth

Advancements in vaccine technology are a significant growth driver for the global animal vaccines market as they provide more effective and safer vaccination options. New technologies, including mRNA vaccines, subunit vaccines, and novel adjuvants, enhance immune responses and reduce adverse effects. Furthermore, these technologies facilitate the quick development of vaccines in response to emerging diseases or health threats within the animal population. New delivery methods, such as intranasal and oral vaccines, make the vaccines more convenient and compliant for veterinarians and pet owners to protect their animals. Continued investment in research and development ensures a pipeline of new and improved vaccines and expands treatment options for many species. In fact, with the growing demand for advanced, reliable, and efficient vaccines, these technological advancements have become important with regard to market growth and animal health and welfare. The increase in public knowledge regarding infertility and the availability of treatment options has reflected greater acceptance of assisted reproductive technologies. The more people have come to realize their possibilities through IVF, the more the number of people seeking these services continues to rise. Advances in technology, including better techniques for embryo culture, preimplantation genetic testing, and improvements in cryopreservation, have greatly increased the success rates of IVF treatment. This also makes the procedures more effective and can increase the number of options available to a patient, including the option of genetic screening and the possibility of freezing eggs or embryos for future use. Fertility clinics increasingly embrace high-tech facilities to attract and retain patients and further foster market growth. With continued spreading awareness and advancements in technology, the IVF market will expand steadily in the years to come.

For instance, on December 7, 2023, the U.S. Food and Drug Administration FDA cleared the kit for use by consumers. Mosie Inc. manufactured the first over-the-counter artificial insemination kit. The approval of the artificial insemination kit is expected to drive the market by making fertility treatments more accessible, affordable, and inclusive. For instance, in July 2023, Kansas State University's College of Veterinary Medicine announced the launch of a new Center on Vaccine Evaluation and Alternatives for Antimicrobials, or CVEAA, which focuses on developing animal vaccines and their usage. In addition to research projects supported by the U.S. Department of Agriculture and the Department of Homeland Security on safety and efficacy testing of experimental vaccines on African swine fever, classical swine fever, and porcine reproductive and respiratory syndrome, as well as co-development of new adjuvants for animal vaccines.

Attenuated Live Vaccines Segment to Dominate the Animal Vaccines Market

One of the major growth drivers of this market is the need for attenuated live vaccines because these vaccines create strong and long-lasting immunity. Attenuated live vaccines contain live, weakened pathogens and have been found to be highly effective in preventing a whole range of infectious diseases in livestock as well as companion animals. As they provide important benefits in terms of herd immunity and reduce disease outbreaks, attenuated live vaccines have become the first choice of many vaccination programs. Cost-effective and likely requiring fewer doses than inactivated vaccines, these vaccines are also much more attractive.

Improved production technologies of vaccines further enhance the safety and efficacy of such products and dissolve the present controversy in terms of reversion to virulence. With growing awareness and acceptance of live vaccines and the associated benefits in terms of their application, the animal vaccine sector is likely to grow in the future. For instance, in August 2024, Hyderabad-based vaccine maker Indian Immunologicals Limited (IIL) developed a live-attenuated needle-free intra-nasal booster vaccine against the Sars-CoV-2 virus that causes Covid-19. The vaccine has been developed in partnership with Griffith University, Australia.

North America Dominates the Animal Vaccines Market

North America is anticipated to dominate the animal vaccines market owing to several factors, such as the high prevalence rate of animal diseases in the region. Chronic waste disease (CWD) has been identified in free-ranging cervids of 24 states and 4 provinces, as well as in captive cervid facilities of 19 states and three provinces. The latest finding was reported by the California Department of Fish and Wildlife, which states that CWD has been found in deer and elk This high prevalence drives the demand for effective animal vaccines. The United States and Canada are among the leaders, with larger organizations investing in research and development and coming up with innovative vaccination solutions. This region has a high demand for vaccines due to the importance of the livestock industry and the growing pet population, hence the awareness of preventative healthcare. Moreover, government measures are very strong in controlling animal diseases, which supports market growth. As North America continues to prioritize animal health, its dominant position in the global animal vaccines market is expected to persist, leading to ongoing advancements in vaccine technology and improved animal welfare outcomes.

For instance, in May 2024, MSD Animal Health, a business of Merck & Co., Inc., Rahway, N.J., USA, announced that the European Commission had granted marketing authorization for the Innovax-ND-H5 vaccine for chickens. The Innovax-ND-H5 vaccine is the first centrally registered vaccine in the European Union against the currently circulating avian influenza virus strains of clade 2.3.4.4b.

Future Market Scenario (2024-2031F)

The animal vaccines market has a potential and promising future market scenario with the dawn of numerous new trends and innovations. With growing awareness of animal health and welfare, effective vaccination solutions are sought by both the livestock and companion animal sectors. Advanced technologies like mRNA vaccines and vector-based vaccines are likely to improve the efficacy and safety of vaccinations, resulting in new ways of disease prevention. A "One Health" approach is increasingly encouraged to recognize the important interconnection between human, animal, and environmental health. This will also spur further investment in the research of zoonotic diseases and their vaccine development. The animal vaccines market is going to see tremendous growth in securing healthier populations around the world while new markets are opened by expanding markets in developing regions and progress in production and delivery methods.

For instance, in May 2024, HIPRA launched the new DIVENCE range, with innovative vaccines designed to intensively increase the prevention of the most viral diseases in cattle. DIVENCE represents the highest standards in terms of safety and efficacy against the most relevant respiratory and reproductive viruses affecting cattle and is the first multivalent vaccine marked for infectious bovine rhinotracheitis (IBR) virus and bovine viral diarrhea (BVD) virus.

Key Players Landscape and Outlook

The animal vaccines market is highly dynamic; the market activity reported in recent years includes business agreements and regulatory approvals of products of market players. The market has witnessed many business activities like strategic mergers, acquisitions, and collaborations in recent times.

For instance, in January 2024, Boehringer Ingelheim announced the commercial launch of Vaxxilive Cocci 3, a poultry coccidiosis vaccine previously known as Hatchpak Cocci III. This preventative tool for coccidiosis is a live biological alternative to in-feed anticoccidial drugs. This vaccine stimulates the natural immune response while minimizing tissue damage. VAXXILIVE COCCI 3 is tough on coccidiosis and gentle on birds.

In June 2024, Merck Animal Health, known as MSD Animal Health outside of the United States and Canada, announced the launch and availability of the NOBIVAC NXT. The NOBIVAC NXT rabies portfolio is the first-line vaccine that uses frontier RNA-particle technology to prevent rabies caused by cats and dogs. These vaccines made of RNA particles cause both the humoral and cell-mediated responses. The new NOBIVAC NXT vaccines are adjuvant-free and preservative-free, providing better animal safety and protecting dogs and cats against this deadly disease.

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