

Veterinary Anti-infectives - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

Veterinary Anti-infectives Market Analysis

The veterinary anti-infectives market reached USD 8.74 billion in 2025 and is forecast to climb to USD 11.31 billion by 2030, reflecting a 5.3% CAGR. Robust demand spans both food-producing and companion animals as antimicrobial agents remain essential for managing respiratory, enteric, and dermatological infections. Livestock intensification, especially in Asia Pacific, is lifting volume needs, while rising pet ownership and "humanization" trends are expanding premium product sales in developed economies. Governments are simultaneously tightening antimicrobial stewardship rules, stimulating investment in precision-dosing technologies, targeted formulations, and alternatives that mitigate resistance. Consolidation among manufacturers and a pivot toward digital pharmacy channels further shape competitive strategies as companies seek scale, regulatory expertise, and direct-to-consumer reach within the veterinary anti-infectives market.

Global Veterinary Anti-infectives Market Trends and Insights

Rising Prevalence of Zoonotic & Food-Borne Diseases

Frequent H5N1 outbreaks in poultry and recent detections in US dairy herds have heightened awareness of cross-species transmission risks, prompting emergency vaccine collaborations between Elanco and Medgene. Surveillance reports show 75% of emerging infectious diseases are zoonotic, leading veterinary authorities to boost monitoring budgets and fast-track rapid diagnostic approvals. Zoetis introduced an AI-enabled in-clinic hematology analyser that delivers reference-lab quality results,

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accelerating therapy decisions and supporting data-driven antimicrobial stewardship. Demand for broad-spectrum and long-acting drugs consequently increases across the veterinary anti-infectives market. Governments are also funding One-Health initiatives that merge human and animal epidemiological data, creating sustained procurement pipelines for anti-infective stockpiles. As biosecurity investments rise, suppliers with scalable manufacturing and regulatory fluency gain competitive leverage.

Growing Companion-Animal Ownership & Spending

Pet ownership rates climbed again in 2025, yet more than half of US pet owners deferred at least one medical service primarily due to cost concerns. This affordability gap fuels interest in long-acting injectables such as cefovecin, which provide two-week coverage from a single dose and reduce repeat clinic visits. Corporate practice groups and insurers are piloting wellness-plan models that bundle diagnostics and prescriptions, supporting predictable uptake of premium therapeutics in the veterinary anti-infectives market. Boehringer Ingelheim's 2024 acquisition of Saiba Animal Health added a virus-like-particle platform that aims to produce therapeutic vaccines for chronic canine diseases, reflecting broader demand for novel modalities. Tele-triage and e-prescribing services are scaling rapidly, bringing previously underserved owners into the formal care pathway and expanding the prescription base for anti-infectives. Digital pharmacies integrate seamlessly with these services, offering overnight delivery and automated refill reminders that enhance compliance.

Proliferation of Counterfeit Veterinary Medicines

The WHO estimates that antimicrobial and antimalarial agents dominate global counterfeit seizures, with veterinary channels particularly vulnerable in regions lacking robust regulatory oversight. Studies indicate one-fifth of medicines in sub-Saharan Africa fail quality specifications, threatening treatment outcomes and accelerating resistance. Fragmented supply chains that rely on informal agro-vet stores invite infiltration by falsified products bearing popular brand names. Serialization and blockchain track-and-trace pilots launched by multinational producers demonstrate technical feasibility but remain costly for low-margin rural markets. Regional economic blocs, including ECOWAS, have begun harmonizing registration processes to block unlicensed imports, yet enforcement capacity lags. This proliferation depresses brand equity and complicates stewardship, restraining value growth within the veterinary anti-infectives market.

Other drivers and restraints analyzed in the detailed report include:

Expansion of Intensive Livestock Production Systems / Pipeline of Novel Antimicrobial Classes & Formulations / Escalating Cost of Veterinary Care Services /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Cattle generated the most significant revenue within the veterinary anti-infectives market in 2024, with a 39.7% share, as dairy and beef operations relied on antimicrobials for mastitis and respiratory disease control. The veterinary anti-infectives market size for bovine therapeutics is forecast to grow steadily as large herd operations adopt precision-dosing tools that increase value per dose while containing volumes. Poultry, however, is projected to outpace all other species at a 6.4% CAGR through 2030, propelled by expanding broiler capacity in China, India, and Brazil. Avian-specific formulations with short withdrawal times gain uptake as exporters comply with tighter residue limits. Swine producers continue to grapple with post-weaning diarrhea and African swine fever threats, supporting demand for both antibiotics and immune-modulating feed additives. Companion animals remain a premium niche as owners prioritize convenience formulations, though cost sensitivity shapes purchasing decisions in lower-income brackets.

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The segmental outlook is increasingly shaped by digital surveillance, with cattle feedlots integrating RFID ear tags connected to cloud dashboards that alert veterinarians to subclinical illnesses. These systems shift purchases toward high-potency injectables used earlier in disease cycles, enhancing therapeutic outcomes while reducing course length. Poultry integrators invest in waterline medication controllers that adjust dosing based on real-time flock metrics, raising demand for soluble powders designed for variable pH environments. Aquaculture, though still modest in revenue, emerges as a strategic frontier as Atlantic salmon producers trial phage biocontrol and nano-encapsulated antibiotics to combat sea lice and vibrio infections. The diversified species mix ensures resilience in the veterinary anti-infectives market even as stewardship pressure alters individual usage patterns.

Antibacterials retained a 29.3% share of the veterinary anti-infectives market size in 2024, supported by a broad catalogue of β -lactams, tetracyclines, and macrolides cleared across multiple species. Stewardship initiatives now favor narrow-spectrum and combination products aimed at specific pathogens, prompting reformulation activity among leading brands. Antivirals are forecast to register the fastest 8.3% CAGR as H5N1, porcine reproductive and respiratory syndrome, and koi herpesvirus outbreaks expose gaps in preventive measures. R&D pipelines feature nucleoside analogues and virus-like particle vaccines that promise shorter treatment courses and lower resistance development potential. Antifungals, while representing a smaller revenue pool, address rising incidences of *Malassezia* and *Aspergillus* infections in pets, with single-dose otic gels such as Otiserene and Mometamax Single gaining adoption due to simplified compliance. Antiprotozoals maintain relevance in endemic regions battling coccidiosis and babesiosis, and ongoing trials of toltrazuril combinations highlight a shift toward multi-target therapies.

The innovation pipeline concentrates on delivery enhancements. Long-acting injectable suspensions deliver steady plasma levels for up to two weeks, boosting adherence while limiting clinic revisits. Water-stable micropellets allow uniform dispersion in poultry and shrimp ponds, reducing sediment wastage. Companies also explore biodegradable implant matrices for slow-release antiviral peptides in swine, bridging prophylaxis and treatment. Collectively, these advances ensure the veterinary anti-infectives market retains a balanced mix of established classes and breakthrough modalities that respond to species-specific disease burdens.

The Veterinary Anti-Infectives Market is Segmented by Animal Type (Cattle, Poultry, and More), Product Type (Antibacterials, Antivirals, and More), Mode of Administration (Oral, Parenteral, and More), Distribution Channel (Veterinary Hospitals, Veterinary Clinics, and More), and by Geography (North America, Europe, Asia-Pacific, and More). The Market Sizes and Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America retained the largest revenue in 2024, anchored by advanced veterinary infrastructure and high per-animal spending. FDA prescription-only reforms curtailed hobby-farmer antibiotic purchases, but stimulated demand for diagnostics and refined dosing tools that help practitioners justify therapies in stewardship-scrutinized environments. Canada's Veterinary Drugs Directorate aligns closely with US regulations, easing cross-border trade and encouraging harmonized label expansions for new molecules. Mexico benefits from integrated supply chains, though varied enforcement capacity leads multinational firms to emphasize training and quality-assurance initiatives to safeguard brand integrity.

Europe showcases the world's strictest antimicrobial-usage controls, achieving a 50% reduction in veterinary antibiotic sales over 12 years through the ESVAC surveillance network. Distributors now report usage volumes into a centralized EU database, a transparency measure that influences purchasing and supplier negotiations. Category-B caps reorient sales toward first-line products, prompting companies to divulge robust stewardship arguments when submitting new dossiers. Post-Brexit, the UK introduced fast-track procedures for innovative veterinary medicines, accelerating launches but maintaining follow-up pharmacovigilance to guard against resistance.

Asia Pacific is the fastest-growing arena at 7.2% CAGR, propelled by China and India's expanding protein appetites and maturing companion-animal markets. Government programs to modernize dairy and broiler sectors prioritize biosecurity, elevating orders

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for high-quality injectable ceftiofur and florfenicol. Simultaneously, environmental crackdowns on pharmaceutical-plant effluent in China periodically tighten API exports, adding volatility to regional supply of tetracyclines and macrolides. Japan's Ministry of Agriculture requires annual farm-level antibiotic reporting from 2026, a precedent that could inspire similar mandates across ASEAN and further evolve the veterinary anti-infectives market.

List of Companies Covered in this Report:

Zoetis / Boehringer Ingelheim / Merck / Elanco Animal Health Inc. / Ceva / Virbac / Vetoquinol / Phibro Animal Health / Dechra Pharmaceuticals / Huvepharma EOOD / Bimeda Holdings PLC / Norbrook Laboratories Ltd. / HIPRA SA / Kyoritsu Seiyaku Corp. / Orion Animal Health / Ourofino Saude Animal / Zydus Animal Health /

Additional Benefits:

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Table of Contents:

1 Introduction

1.1 Study Assumptions & Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 Rising Prevalence of Zoonotic & Food-Borne Diseases

4.2.2 Growing Companion-Animal Ownership & Spending

4.2.3 Expansion Of Intensive Livestock Production Systems

4.2.4 Pipeline of Novel Antimicrobial Classes & Formulations

4.2.5 Precision-Livestock Tools Enabling Targeted Dosing

4.2.6 Aquaculture Regulations Spurring Next-Gen Anti-Infectives

4.3 Market Restraints

4.3.1 Proliferation of Counterfeit Veterinary Medicines

4.3.2 Escalating Cost of Veterinary Care Services

4.3.3 AMR-Driven Usage Caps Reducing Prophylactic Volumes

4.3.4 API Supply Shocks from Stricter Environmental Rules

4.4 Value Chain Analysis

4.5 Regulatory Landscape

4.6 Technological Outlook

4.7 Porter's Five Forces

4.7.1 Threat of New Entrants

4.7.2 Bargaining Power of Buyers

4.7.3 Bargaining Power of Suppliers

4.7.4 Threat of Substitutes

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4.7.5 Intensity of Competitive Rivalry

5 Market Size & Growth Forecasts (Value)

5.1 By Animal Type

5.1.1 Cattle

5.1.2 Poultry

5.1.3 Swine

5.1.4 Cats

5.1.5 Dogs

5.1.6 Other Animals

5.2 By Product Type

5.2.1 Antibacterials

5.2.2 Antivirals

5.2.3 Antifungals

5.2.4 Antiprotozoals & Others

5.3 By Mode of Administration

5.3.1 Oral

5.3.2 Parenteral

5.3.3 Topical

5.3.4 Others

5.4 By Distribution Channel

5.4.1 Veterinary Hospitals

5.4.2 Veterinary Clinics

5.4.3 Pharmacies & Drug Stores

5.4.4 Online Channels

5.5 By Geography

5.5.1 North America

5.5.1.1 United States

5.5.1.2 Canada

5.5.1.3 Mexico

5.5.2 Europe

5.5.2.1 Germany

5.5.2.2 United Kingdom

5.5.2.3 France

5.5.2.4 Italy

5.5.2.5 Spain

5.5.2.6 Rest of Europe

5.5.3 Asia Pacific

5.5.3.1 China

5.5.3.2 Japan

5.5.3.3 India

5.5.3.4 South Korea

5.5.3.5 Australia

5.5.3.6 Rest of Asia Pacific

5.5.4 Middle East and Africa

5.5.4.1 GCC

5.5.4.2 South Africa

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5.5.4.3 Rest of Middle East and Africa

5.5.5 South America

5.5.5.1 Brazil

5.5.5.2 Argentina

5.5.5.3 Rest of South America

6 Competitive Landscape

6.1 Market Concentration

6.2 Market Share Analysis

6.3 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)

6.3.1 Zoetis Inc.

6.3.2 Boehringer Ingelheim GmbH

6.3.3 Merck & Co., Inc.

6.3.4 Elanco Animal Health Inc.

6.3.5 Ceva Sante Animale

6.3.6 Virbac SA

6.3.7 Vetoquinol SA

6.3.8 Phibro Animal Health Corp.

6.3.9 Dechra Pharmaceuticals PLC

6.3.10 Huvepharma EOOD

6.3.11 Bimeda Holdings PLC

6.3.12 Norbrook Laboratories Ltd.

6.3.13 HIPRA SA

6.3.14 Kyoritsu Seiyaku Corp.

6.3.15 Orion Animal Health

6.3.16 Ourofino Saude Animal

6.3.17 Zydus Animal Health

7 Market Opportunities & Future Outlook

7.1 White-space & Unmet-need Assessment

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