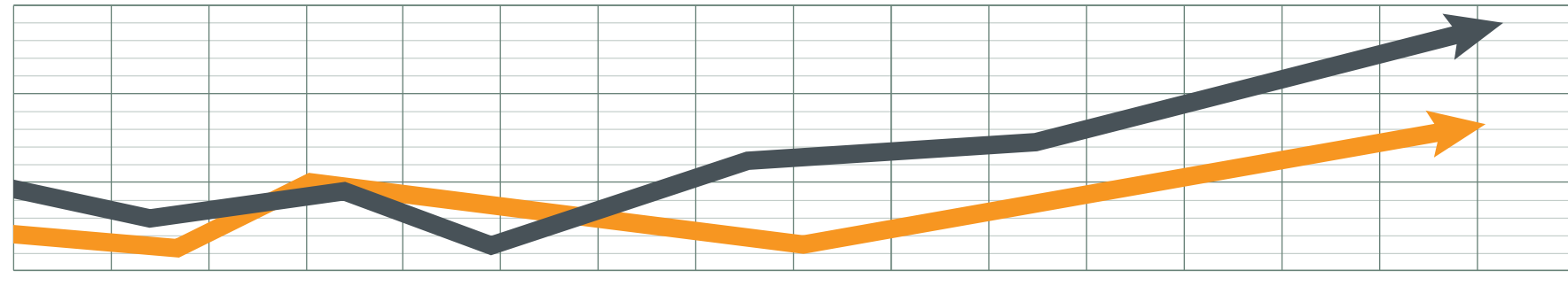


The Future of Animal Health: Strategic Lessons from Human Healthcare

Innovation in animal health is accelerating, driven by investment shifts, emerging technologies and evolving market needs



Market expansion



Companion animal health is growing 6-8% annually, surpassing 50% of the market

Investment in companion care and advanced therapeutics is outpacing livestock health

Evolving consumer demand

Increasing pet humanisation amongst Millennials and Gen Z, who now own over 50% of pets, is driving demand for premium healthcare and digital solutions

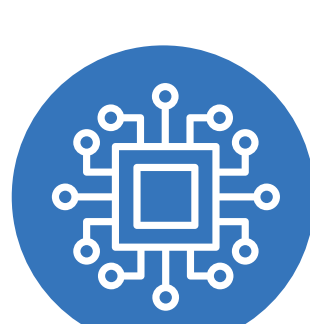
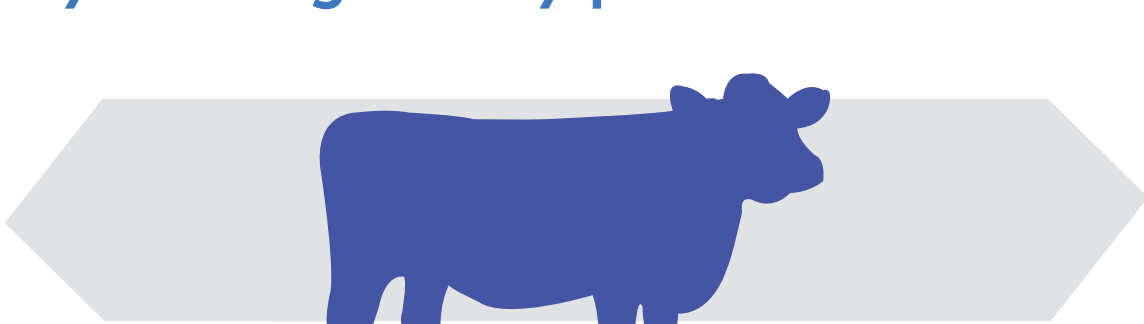


Longer pet lifespans = higher demand for chronic disease care and advanced treatments

Sustainability and regulatory pressure in livestock



Shift towards antibiotic alternatives and more sustainable vaccines



AI-driven precision farming and digital monitoring is transforming herd management

Key innovations disrupting the industry

Preventive medicine



Vaccines reducing reliance on antibiotics

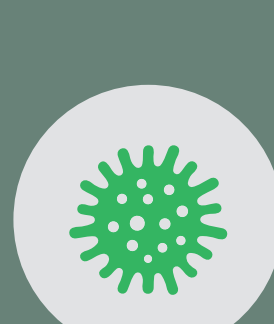


Genetic testing to guide disease prevention

Advanced veterinary therapies



Expansion of monoclonal antibodies and cell and gene therapies



Specialised treatments for chronic and historically underserved disease areas

AI, digital health and telemedicine



AI-driven drug discovery accelerating development timelines



AI-powered diagnostics improving early disease detection



Telehealth and wearable monitoring enhancing pet and livestock care

Emerging market adaptations



Investment in local vaccine production and cost-effective treatments



Temperature-stable formulations improving accessibility in high-growth markets

Business and investment implications

Shifting R&D priorities



R&D spend, particularly amongst large players focusing on companion animals, is increasing compared to historical norms



Focus on biologics, AI-assisted diagnostics and long-term disease prevention

M&A, strategic partnerships and divestments

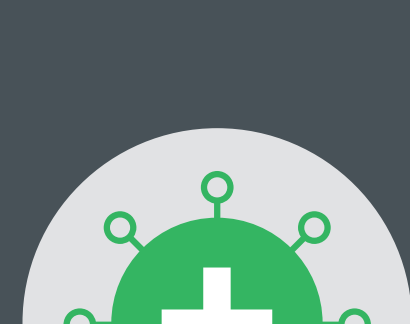


Biotech acquisitions and strategic partnerships in precision medicine, digital health and diagnostics mirror human healthcare trends



Strategic divestments reallocate resources to innovative segments

Positioning for the future



Animal health is entering a new era. New technologies like precision medicine and AI, drawing inspiration from human health innovations, are accelerating industry transformation



The companion animal segment is expected to lead market growth; there will also be significant opportunities in livestock



M&A, R&D investment and regulatory alignment are key to long-term success

Take a closer look

Explore the key drivers reshaping animal health and their implications for the industry's future in

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