

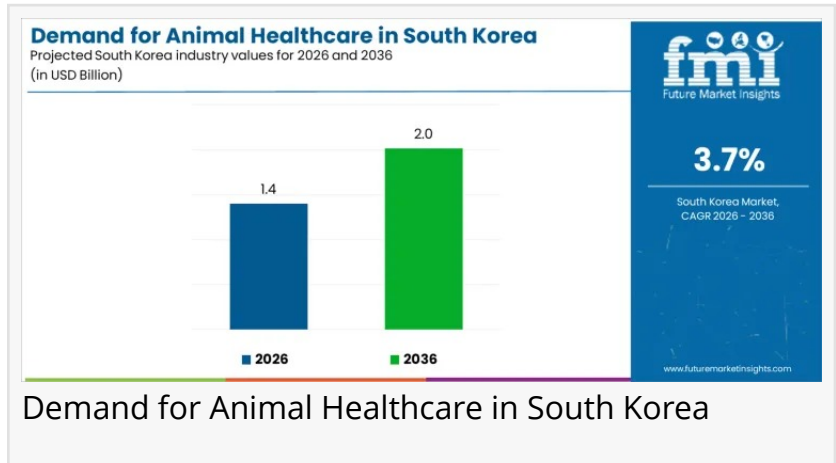
South Korea Animal Healthcare Expenditure to Reach USD 2.0 Billion by 2036 as Biosecurity and Pet Care Needs Converge

South Korea's animal healthcare market is projected to grow from USD 1.4 billion in 2026 to USD 2.0 billion by 2036, driven by biosecurity and pet care demand.

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Expenditure on [animal healthcare in South Korea](#) is projected to reach USD 1.4 billion in 2026 and is expected to exceed USD 2.0 billion by 2036,

expanding at a compound annual growth rate (CAGR) of 3.7%. The market is shaped by two parallel forces: heightened biosecurity measures in the country's industrial livestock sector and rapid growth in premium veterinary services for companion animals.



South Korea's animal healthcare ecosystem is evolving in response to public health priorities and changing consumer behavior. Government authorities continue to strengthen disease prevention frameworks following past outbreaks of avian influenza and African swine fever, while pet owners increasingly treat veterinary care as an essential household expense rather than discretionary spending. Together, these trends are redefining demand across pharmaceuticals, diagnostics, and veterinary services nationwide.

Market Context: Regulation and Demographics Drive Demand

Growth in animal healthcare spending is closely tied to regulatory oversight. Enforcement of the Act on the Prevention of Contagious Animal Diseases has mandated rigorous vaccination schedules, enhanced diagnostic surveillance, and upgrades to veterinary hospital infrastructure. These measures create a stable baseline demand for vaccines, biologics, and diagnostic tools, particularly in regions with high livestock density.

At the same time, demographic shifts within the pet population are reshaping service demand. Nearly 40% of dogs in South Korea are now classified as seniors, driving higher utilization of chronic disease management, oncology treatments, and advanced imaging. The "pet

humanization” trend has elevated expectations for human-grade medical standards, pushing clinics to invest in advanced equipment and specialized care.

Industry Size and Structure at a Glance

The animal healthcare market in South Korea reflects its bifurcated structure, serving both production animals and companion animals with distinct needs:

- Industry value (2026): USD 1.4 billion
- Forecast value (2036): USD 2.0 billion
- CAGR (2026–2036): 3.7%
- Leading product type: Pharmaceuticals (37.5% share)
- Leading animal type: Production animals (52.0% share)
- Primary service providers: Veterinary hospitals (62.0%)

Pharmaceuticals dominate due to consistent demand for antibiotics, anti-inflammatories, parasiticides, and chronic care medications across both segments.

Why Production Animals Remain Central to Market Volume

Production animals account for more than half of total demand, reflecting South Korea’s intensive poultry and swine farming systems. High farm density in provinces such as South and North Jeolla and South Gyeongsang necessitates continuous health monitoring and vaccination programs to safeguard food security. Investments in smart farming technologies are further integrating animal health monitoring with automated feeding and management systems.

Regulatory pressure to curb antimicrobial resistance is also reshaping feed additive usage. Farmers are increasingly adopting functional and probiotic formulations that enhance immunity and gut health, positioning feed additives as preventive tools rather than growth enhancers.

Companion Animals: Fastest-Growing Value Segment

While livestock drives volume, the companion animal segment is expanding fastest in value terms. Urbanization and indoor pet ownership have accelerated demand for dental care, dermatology, rehabilitation, and preventative therapies such as heartworm prevention. Over-the-counter veterinary drugs and dietary supplements are gaining traction beyond clinics, supported by a well-informed consumer base focused on preventative care and quality of life.

Technology and Telemedicine Gain Momentum

Digital adoption is emerging as a defining trend. Veterinary telemedicine is being piloted for initial consultations and post-operative monitoring, leveraging South Korea’s high smartphone penetration. AI-enabled diagnostic tools are allowing smaller clinics to deliver specialist-level

assessments in areas such as dermatology and radiology, improving access to care, particularly in rural regions.

Regional Dynamics Highlight Uneven Growth

Regional demand patterns reflect local economic and agricultural profiles:

- Jeju: CAGR 4.4%, driven by equine healthcare and pet-friendly tourism
- South Gyeongsang: CAGR 3.9%, supported by mixed livestock farming and urban pet care
- South Jeolla: CAGR 3.5%, influenced by aquaculture and livestock health needs
- North Jeolla: CAGR 3.0%, focused on biosecurity and poultry disease prevention

These variations underline the importance of region-specific healthcare strategies.

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Competitive Landscape: Global Leaders and Local Specialists

The competitive hierarchy is led by multinational companies such as Zoetis Inc., Boehringer Ingelheim Animal Health, Merck Animal Health, Elanco Animal Health, and Ceva Santé Animale. Zoetis alone accounts for roughly 30% of the market, leveraging an integrated portfolio spanning diagnostics, therapeutics, and genetic testing.

Domestic players, including Choong Ang Vaccine Laboratories, Green Cross Veterinary Products, and Komipharm International, are carving niches through vaccines tailored to local disease strains and companion animal supplements aligned with preferences for natural ingredients.

Key Companies

- Zoetis Inc.
- Boehringer Ingelheim Animal Health
- Merck Animal Health (MSD Animal Health)
- Elanco Animal Health Incorporated
- Ceva Santé Animale
- Choong Ang Vaccine Laboratories
- Green Cross Veterinary Products
- Daesung Microbiological Labs
- Komipharm International
- CTC Bio

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