

State of Companion Animal Health Launches

North America · 2026

A data-driven analysis of the companion animal health commercial landscape in North America — market dynamics, competitive intensity, launch performance, KPI benchmarks, and the 2027 outlook.

MARKET LANDSCAPE

COMPETITIVE ANALYSIS

LAUNCH BENCHMARKS

2027 OUTLOOK

Five things commercial teams need to know.

- **01.** \$19.5B market. Growing at 9% CAGR through 2031 — but vet visits are down for the 4th straight year.
- **02.** Three derm products approved in 18 months. Apoquel, Cytopoint, Zenrelia, Numelvi, and Befrena are all live simultaneously.
- **03.** Elanco is winning 2026. Zenrelia hit blockbuster status in under 18 months. Befrena launched Q2. Innovation revenue target raised to \$1.2B.
- **04.** Zoetis key dermatology fell 11% in Q1 2026. Apoquel losing share on price. Pipeline answer not available until 2027 at earliest.
- **05.** Clinic habit formation is happening right now. Every 2026 prescription builds a protocol competitors will need to displace.

\$19.5B

companion animal
health market 2025.

- **\$21.3B** estimated 2026 market size
- **\$33.0B** projected 2031 (9.1% CAGR)
- **38%** North America share of global revenue
- **\$1.3B** US canine dermatology market alone
- **-3.1%** vet clinic visit decline — 2025 (4th consecutive year)

5 products.

1 category.

\$1.3B market.

Apoquel Zoetis · JAK inhibitor · US revenue -13% Q1 2026 · price pressure

Cytoint Zoetis · Anti-IL31 mAb · visit-constrained · long-acting in pipeline

Zenrelia Elanco · JAK inhibitor · blockbuster in <18 months · 2M+ dogs treated

Numelvi Merck AH · 2nd-gen JAK1 · FDA Feb 2026 · S&P Best Product 2025

Befrena Elanco · Anti-IL31 mAb · 6–8 wk interval · launched Q2 2026

This is a **4-slide preview.**

The full 15-page report covers:

- Section 1 — Full market size & structure data
- Section 2 — Big Four company-by-company analysis
- Section 3 — 5-product dermatology competitive map
- Section 4 — Zenrelia case study + 5 structural launch gaps
- Section 5 — Year 1 KPI benchmarks (field + marketing)
- Section 6 — 18-month forward outlook through 2027

Get the full report — free
vetlaunchlab.beehiiv.com