

Global Veterinary CRO And CDMO Market Size study, by Animal Type (Companion, Livestock), Service Type (CRO [Clinical Trials, Quality Assurance], CDMO [Manufacturing, Development, Packaging & Labelling]), Product (Drugs, Biologics), and Regional Forecasts 2022-2032

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Abstracts

The Global Veterinary CRO and CDMO Market is valued at approximately USD 6.2 billion in 2023 and is projected to grow with a strong compound annual growth rate of 8.70% during the forecast period from 2024 to 2032. As the veterinary healthcare industry witnesses a paradigm shift toward specialized outsourcing, contract research organizations (CROs) and contract development and manufacturing organizations (CDMOs) have emerged as pivotal stakeholders driving innovation, efficiency, and regulatory compliance. Veterinary CROs and CDMOs serve as strategic partners, enabling pharmaceutical and biotechnology companies to streamline R&D processes, accelerate time-to-market, and reduce operational overhead, particularly in the development of animal health drugs and biologics. This surge in outsourcing demand is underpinned by the global rise in zoonotic diseases, increasing pet adoption rates, and the soaring complexity of veterinary therapeutic pipelines.

The market's growth trajectory is reinforced by several transformative forces reshaping animal health R&D. On the one hand, the rising cost and regulatory rigor of in-house drug development have propelled both established players and emerging startups to embrace outsourced service models for clinical trials, toxicology studies, quality assurance, and manufacturing. On the other hand, the increasing prevalence of chronic conditions in companion animals has spurred demand for long-acting biologics and specialty drugs—segments where CDMOs play a critical role in formulation, scale-up,

and GMP-compliant production. Additionally, veterinary CROs are investing heavily in building species-specific clinical trial models and digital data monitoring solutions to enhance trial accuracy and compliance, ultimately transforming animal health drug development from reactive to proactive.

Notably, the convergence of biopharmaceutical innovation with veterinary care is expanding the scope of CDMOs beyond traditional manufacturing. Today, service providers are increasingly engaged in end-to-end product lifecycle management—from development and analytical testing to regulatory documentation, packaging, and distribution. This full-spectrum service delivery has become especially attractive for multinational pharmaceutical firms that are entering or expanding in the animal health vertical. Furthermore, the increasing emphasis on personalized veterinary medicine and vaccine development has encouraged CDMOs to explore flexible, modular production technologies and invest in cold chain logistics, all of which improve their competitiveness in the evolving market landscape.

Regionally, North America holds the lion's share of the global veterinary CRO and CDMO market, driven by robust veterinary healthcare infrastructure, strong presence of major pharma manufacturers, and favorable regulatory pathways. Europe follows closely, leveraging its rich ecosystem of animal research institutions, funding support, and growing companion animal population. However, it is Asia Pacific that is poised to witness the fastest growth during the forecast period. This growth is primarily fueled by expanding livestock industries, supportive government policies, increasing investments in biotech innovation, and the emergence of regional CDMO hubs in countries like India and China. Latin America and the Middle East & Africa are gradually catching up, offering promising opportunities through their evolving veterinary regulatory frameworks and demand for affordable animal health solutions.

Major market player included in this report are:

Zoetis Inc.

Boehringer Ingelheim International GmbH

Elanco Animal Health Inc.

Merck Animal Health

Virbac

Norbrook Laboratories

Argenta

Evonik Industries AG

Recipharm AB

Vetoquinol S.A.

Nimble Systems Inc.

KINOMEA

MedPharm Ltd.

Cadila Healthcare Ltd. (Zydus Animal Health)

UPM Pharmaceuticals

The detailed segments and sub-segment of the market are explained below:

By Animal Type

Companion

Livestock

By Service Type

Contract Research Organization (CRO)

Clinical Trials

Quality Assurance

Contract Development and Manufacturing Organization (CDMO)

Manufacturing

Development

Packaging & Labelling

By Product

Drugs

Biologics

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

RoMEA

Years considered for the study are as follows:

Historical year – 2022

Base year – 2023

Forecast period – 2024 to 2032

Key Takeaways:

Market Estimates & Forecast for 10 years from 2022 to 2032.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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