

Global Companion Animal In-clinic IVD Diagnostic Instruments Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Companion Animal In-clinic IVD Diagnostic Instruments market size is expected to reach \$ 889 million by 2032, rising at a market growth of 8.0% CAGR during the forecast period (2026-2032).

In 2025, global shipments of companion animal in-clinic IVD diagnostic instruments reached approximately 86.3 thousand units, with an average device price of about US\$5,750 per unit. Companion animal in-clinic IVD diagnostic instruments refer to specialized diagnostic devices used inside veterinary hospitals, veterinary clinics, and other companion animal care facilities to perform on-site testing and support clinical diagnosis for dogs, cats, and other companion animals. These instruments mainly include hematology analyzers, clinical chemistry analyzers, immunoassay analyzers, blood gas, electrolyte and coagulation analyzers, molecular diagnostic instruments, as well as selected urinalysis, digital microscopy and AI-based morphology analysis systems. They are designed to process animal samples, detect biological signals, analyze test results and generate diagnostic outputs, enabling veterinarians to conduct routine health screening, biochemical testing, inflammation and hormone testing, infectious disease detection, emergency assessment and treatment monitoring within the clinical setting.

The companion animal in-clinic IVD diagnostic instruments market is entering a stage where veterinary care is shifting from experience-based diagnosis to data-driven clinical decision-making. Rising demand for senior pet care, chronic disease management, pre-surgical assessment, emergency and critical care, and routine wellness testing is increasing the adoption of hematology, clinical chemistry, immunoassay, blood gas, and molecular diagnostic instruments in veterinary hospitals and clinics. The global market

is estimated at approximately US\$496 million in 2025 and is expected to reach about US\$544 million in 2026, indicating that in-clinic diagnostics are becoming essential infrastructure for improving diagnostic efficiency and client retention in companion animal care.

By product structure, hematology analyzers and clinical chemistry analyzers remain the most fundamental and widely installed categories, while immunoassay analyzers and critical care testing instruments are gaining traction due to growing demand for inflammation markers, hormone testing, cardiac biomarkers, blood gas, electrolytes, and coagulation testing. Molecular diagnostic instruments and AI-enabled morphology systems currently account for a smaller base, but they offer strong growth potential in rapid infectious disease screening, precision diagnosis, and automated sample interpretation. The market is gradually evolving from a hardware sales model toward a combined model of instrument placement, consumable pull-through, connected diagnostics, and intelligent data analysis.

In terms of competition, global leaders such as IDEXX, Zoetis, and Mars/Antech maintain strong positions through brand recognition, closed consumable systems, installed base advantages, and broad diagnostic menus. FUJIFILM, Sysmex, HORIBA, and Bionote remain competitive in selected instrument platforms. Chinese manufacturers are increasingly entering the market through microfluidic chemistry, fluorescence immunoassay, pet PCR, and AI-based morphology analysis, with companies such as Mindray, Seamaty, Wondfo/Wondko, Getein, Dymind, and Coyote Bioscience expanding their veterinary diagnostic portfolios. The global market is projected to grow at a CAGR of about 8.2% from 2026 to 2032, driven by higher in-clinic testing penetration, the upgrading of pet healthcare in Asia, the adoption of emerging diagnostic technologies, and the standardization of companion animal clinical workflows.

This report studies the global Companion Animal In-clinic IVD Diagnostic Instruments production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Companion Animal In-clinic IVD Diagnostic Instruments and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Companion Animal In-clinic IVD Diagnostic Instruments that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Companion Animal In-clinic IVD Diagnostic Instruments total production and demand, 2021-2032, (K Units)

Global Companion Animal In-clinic IVD Diagnostic Instruments total production value, 2021-2032, (USD Million)

Global Companion Animal In-clinic IVD Diagnostic Instruments production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Companion Animal In-clinic IVD Diagnostic Instruments consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Companion Animal In-clinic IVD Diagnostic Instruments domestic production, consumption, key domestic manufacturers and share

Global Companion Animal In-clinic IVD Diagnostic Instruments production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Companion Animal In-clinic IVD Diagnostic Instruments production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Companion Animal In-clinic IVD Diagnostic Instruments production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Companion Animal In-clinic IVD Diagnostic Instruments market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include IDEXX Laboratories, Inc., Zoetis Inc., Mars, Incorporated, Nova Biomedical Corporation, Thermo Fisher Scientific Inc., Alfa Wassermann Diagnostic Technologies, LLC, HTI Medical Inc., Carolina Liquid Chemistries Corp., Drew Scientific, Inc., FUJIFILM Corporation, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Companion Animal In-clinic IVD Diagnostic Instruments market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$

Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Companion Animal In-clinic IVD Diagnostic Instruments Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Companion Animal In-clinic IVD Diagnostic Instruments Market, Segmentation by Type:

Hematology Analyzers

Clinical Chemistry Analyzers

Immunoassay Analyzers

Critical Care & Coagulation Analyzers

Molecular Diagnostic Instruments

Other In-clinic IVD Instruments

Global Companion Animal In-clinic IVD Diagnostic Instruments Market, Segmentation by Animal Type:

Dogs

Cats

Other Companion Animals

Global Companion Animal In-clinic IVD Diagnostic Instruments Market, Segmentation by Application:

Veterinary Hospitals

Veterinary Clinics

Other End Users

Companies Profiled:

IDEXX Laboratories, Inc.

Zoetis Inc.

Mars, Incorporated

Nova Biomedical Corporation

Thermo Fisher Scientific Inc.

Alfa Wassermann Diagnostic Technologies, LLC

HTI Medical Inc.

Carolina Liquid Chemistries Corp.

Drew Scientific, Inc.

FUJIFILM Corporation

Sysmex Corporation

HORIBA, Ltd.

ARKRAY, Inc.

Nihon Kohden Corporation

Bionote, Inc.

Boditech Med Inc.

Virbac S.A.

Randox Laboratories Ltd.

Boule Diagnostics AB

Diatron MI Zrt.

EUROLyser Diagnostica GmbH

PZ Cormay S.A.

BioSystems S.A.

Balio Diagnostics

Skyla Corporation

Agappe Diagnostics Ltd.

Tulip Diagnostics Pvt. Ltd.

Shenzhen Mindray Bio-Medical Electronics Co., Ltd.

Chengdu Seamaty Technology Co., Ltd.

Wondfo Biotech Co., Ltd.

Getein Biotech Inc.

Shenzhen Dymind Biotechnology Co., Ltd.

Edan Instruments, Inc.

Coyote Bioscience Co., Ltd.

Genrui Biotech Inc.

URIT Medical Electronic Co., Ltd.

Tianjin MNCHIP Technologies Co., Ltd.

Rayto Life and Analytical Sciences Co., Ltd.

Zybio Inc.

Zhejiang Pushkang Biotechnology Co., Ltd.

Tianjin LOCMEDT Technologies Co., Ltd.

Hunan GenieCare Animal Husbandry Biotechnology Development Co., Ltd.

Qingdao Jiditai Biotechnology Co., Ltd.

Shenzhen ANLV Medical Technology Co., Ltd.

LifeReal Biotechnology Co., Ltd.

JZ Biotech

Key Questions Answered:

1. How big is the global Companion Animal In-clinic IVD Diagnostic Instruments

market?

2. What is the demand of the global Companion Animal In-clinic IVD Diagnostic Instruments market?
3. What is the year over year growth of the global Companion Animal In-clinic IVD Diagnostic Instruments market?
4. What is the production and production value of the global Companion Animal In-clinic IVD Diagnostic Instruments market?
5. Who are the key producers in the global Companion Animal In-clinic IVD Diagnostic Instruments market?
6. What are the growth factors driving the market demand?

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