

# **North America Laboratory Animal Medicine Market Size, Share & Trends Analysis Report By Product, By Animal Model (Rodents, Rabbits, Non-Human Primates), By Application (Rodents, Rabbits, Non-Human Primates (NHPs)), By Customer, By Country, And Segment Forecasts, 2026 - 2033**

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## **Abstracts**

The North America laboratory animal medicine market size was estimated at USD 3.40 billion in 2025 and is projected to reach USD 5.18 billion by 2033, growing at a CAGR of 5.48% from 2026 to 2033. The market growth is driven by the expansion of public diagnostic and surveillance laboratory networks, capital investment in animal health R&D and regulated laboratory infrastructure, tightening animal care standards and oversight expectations, and growth in applied research areas that still depend on in vivo models.

Capital investment in animal health R&D and regulated laboratory infrastructure is one of the crucial dynamic drivers for the sector growth. Large, multi-year investments in biologics manufacturing and research facilities expand production capacity and upstream preclinical and validation activity. New R&D laboratories integrated within manufacturing campuses increase the volume of in vivo studies required for formulation testing, stability work, and regulatory submissions. For instance, in May 2025, Merck Animal Health announced USD 895 million expansion of its De Soto, Kansas, biologics manufacturing facility. Such activities are bringing sustained demand for veterinary oversight, health monitoring, and compliant animal housing.

The path towards highly regulated, GLP-certified laboratories is further amplifying this growth. Certification raises expectations for data integrity, traceability, and repeatability,

thereby enabling tighter control over animal health variables. For instance, in July 2025, Chalk River Laboratories (CRL) became Canada's first GLP-certified lab capable of radioactive work and pre-clinical radiopharmaceutical studies, following a Standards Council of Canada audit that adhered to OECD standards for regulators such as Health Canada and the FDA. Facilities operating under GLP standards require more frequent diagnostics, standardized preventive care protocols, and documented welfare outcomes. This increases healthcare intensity per animal rather than depending on simple growth in animal numbers.

Another important driver for the market is the expansion of public diagnostic and surveillance laboratory networks. This dynamic has been increasing the scale, intensity, and regularity of laboratory animal healthcare activities. Governments are building permanent diagnostic capacity for detecting animal diseases, evaluating vaccines, and conducting safety investigations. This has raised expectations for continuous health monitoring, standardized diagnostics, and documented veterinary oversight across laboratory animal populations. As laboratories become connected through formal networks, testing protocols and quality requirements are becoming more uniform. This drives higher testing frequency per animal, broader use of confirmatory diagnostics, and longer health-monitoring timelines. Animal health data is now generated on a routine basis rather than only during acute events. That change increases demand for diagnostic reagents, skilled veterinary staff, and compliant animal housing systems that support biosecure operations.

## North America Laboratory Animal Medicine Market Report Segmentation

This report forecasts revenue growth at country level and provides an analysis of the latest industry trends in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented the NA laboratory animal medicine market report based on product, animal model, application, customer, and country:

Product Outlook (Revenue, USD Million, 2021 - 2033)

Diagnostics & Health Surveillance Products

Serology & PCR Test Kits

Microbiology & Parasitology Assays

Clinical Chemistry & Hematology Reagents / Panels

Others

## Therapeutics & Preventive Medicines

Vaccines

Anti-infectives (Antibiotics, Antivirals, Antifungals)

Antiparasitics (Endo- & Ecto-parasite Control)

Analgesics & Sedatives

Anesthetics

Anti-inflammatory & Supportive Care Drugs

Others

## Clinical Care Devices & Equipment

Animal Patient Monitoring Devices

Anesthesia Machines & Vaporizers

Ventilators & Respiratory Support Systems

Infusion & Syringe Pumps

Clinical Imaging & Diagnostic Devices

Others

## Clinical & Welfare Consumables

Needles, Syringes, Catheters & Vascular Access Sets

Bandages, Wound Care & Surgical Consumables

Disinfectants, Detergents & Sanitation Products

Personal Protective Equipment (PPE) & Barrier Consumables

Others

Others Products

Animal Model Outlook (Revenue, USD Million, 2021 - 2033)

Rodents

Rabbits

Non-Human Primates (NHPs)

Others

Application Outlook (Revenue, USD Million, 2021 - 2033)

Disease Surveillance & Colony Health Monitoring

Preventive Care & Biosecurity

Perioperative Care (Anesthesia, Analgesia, Surgical Support)

Chronic Disease Management & Supportive Care

Welfare & Behavioral Assessment

End-of-Life & Euthanasia Management

Training, Education & Compliance Support

Others

Customer Outlook (Revenue, USD Million, 2021 - 2033)

Pharmaceutical & Biopharmaceutical Companies

Preclinical CROs & Contract Laboratories

Academic & Research Institutions

Others

Country Outlook (Revenue, USD Million, 2021 - 2033)

U.S.

Canada

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