

Companion Animal Health Market Report by Animal Type (Dogs, Cats, Equine, and Others), Product (Vaccines, Pharmaceuticals, Feed Additives, Diagnostics, and Others), End User (Point-of-care Testing/In-house Testing, Veterinary Hospitals and Clinics, and Others), and Region 2024-2032

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Abstracts

The global companion animal health market size reached US\$ 25.4 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 50.5 Billion by 2032, exhibiting a growth rate (CAGR) of 7.7% during 2024-2032. The rising pet ownership rates worldwide, continuous advancements in veterinary healthcare, and heightened awareness of zoonotic diseases, leading to increased demand for animal health products and services, are some of the major factors propelling the market.

Companion Animal Health Market Analysis:

Market Growth and Size: The market is currently experiencing significant growth, driven by the rising trend of pet ownership and heightened awareness about pet health. This market encompasses a wide range of products and services, including pharmaceuticals, vaccines, diagnostics, and feed additives, catering to the health needs of pets.

Major Market Drivers: Key drivers include the increasing rates of pet ownership, advancements in veterinary healthcare, and a growing focus on zoonotic diseases. These factors are leading to a higher demand for various animal health products and services.

Technological Advancements: Technological innovations, particularly in diagnostics and treatment options, are propelling the market growth. The integration of digital technologies, such as telemedicine and health apps, is enhancing the accessibility and efficiency of veterinary care.

Industry Applications: The market finds its applications in preventive care, treatment of diseases, nutritional management, and chronic condition monitoring in companion animals. Veterinary hospitals and clinics, along with in-home testing, are other key application areas.

Key Market Trends: Major trends include the increasing emphasis on preventive healthcare, the rise of pet insurance, and the growing preference for personalized pet care solutions. The market is also seeing a shift toward more natural and organic pet health products.

Geographical Trends: North America leads the market, while the Asia Pacific region shows rapid growth due to changing lifestyles and economic development. Europe also maintains a strong market presence with its high standards of pet care and regulatory framework.

Competitive Landscape: The market is characterized by the presence of several leading players engaging in research and development (R&D), strategic alliances, and expansion of product portfolios. Competition is based on product innovation, quality, and brand reputation.

Challenges and Opportunities: Challenges include regulatory hurdles, high costs of veterinary care, and disparities in access to advanced healthcare in different regions. However, numerous opportunities lie in emerging markets, the development of cost-effective products, and the escalating demand for telehealth services.

Future Outlook: The companion animal health industry is expected to continue its growth trajectory, with a heightened focus on advanced healthcare solutions, personalized medicine, and sustainable practices. This market is likely to benefit from ongoing technological innovations and a growing emphasis on animal welfare.

Companion Animal Health Market Trends:

Increasing Pet Ownership Rates

The companion animal health market is currently witnessing significant growth due to the rising rates of pet ownership globally. This can be largely attributed to changing societal norms where pets are increasingly considered as part of the family. This emotional bonding with pets is leading to a greater focus on their health and well-being, thereby driving demand for various animal health products and services. Factors such as urbanization, inflating consumer disposable incomes, and the growing awareness of animal health are further contributing to this trend. As pet owners are becoming more informed, they are seeking better healthcare, nutrition, and wellness products for their pets, which, in turn, is fueling the growth of the companion animal health market.

Advancements in Veterinary Healthcare

The market is also being propelled by the ongoing advancements in veterinary healthcare. These advancements encompass a wide range of areas, including diagnostics, therapeutics, and preventive care. Moreover, the development of new vaccines, pharmaceuticals, and diagnostic tools is enabling more effective and efficient treatment of various animal diseases. The integration of technology in veterinary practices, such as telemedicine and mobile health applications, is also playing a crucial role. These technological innovations improve the quality of care provided to companion animals and enhance the accessibility and convenience of veterinary services for pet owners. This factor is crucial in augmenting the growth of the companion animal health market as it directly impacts the ability to provide timely and effective healthcare solutions for pets.

Growing Focus on Zoonotic Diseases

The growing awareness and concern regarding zoonotic diseases – illnesses that can be transmitted from animals to humans – is another significant factor stimulating the companion animal health market. The recent coronavirus (COVID-19) pandemic has particularly led to a heightened awareness about the potential risks posed by zoonotic diseases. As a result, there is an increased emphasis on monitoring and preventing such diseases in companion animals. This trend is fostering substantial investments in research and development (R&D) of vaccines and treatments that target zoonotic pathogens. Besides this, regulatory bodies and animal health organizations worldwide are now more focused on establishing stringent guidelines and preventive measures, which in turn are catalyzing the demand for animal health products and services. This rising focus on preventing zoonotic diseases is crucial for public health as well as instrumental in supporting the growth of the companion animal health market.

Companion Animal Health Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on animal type, product, and end user.

Breakup by Animal Type:

- Dogs
- Cats
- Equine
- Others

Dogs account for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the animal type. This includes dogs, cats, equine, and others. According to the report, dogs represented the largest segment.

The dogs segment holds the largest share in the companion animal health market, reflecting the widespread ownership of dogs as pets globally. This segment benefits from the strong emotional bond between dogs and their owners, leading to considerable spending on healthcare, nutrition, and wellness products. Dog owners are increasingly seeking preventive healthcare, regular check-ups, and advanced treatments for their pets, driving demand for a range of products from pharmaceuticals to specialized diets. Innovations in dog healthcare, including advanced therapeutics and diagnostics, are also key factors contributing to the growth of this segment. The market for dogs is further strengthened by the rising trend of pet humanization, where owners treat their dogs as family members, ensuring high-quality healthcare and lifestyle products.

The cats segment in the companion animal health market is significant, fueled by the growing popularity of cats as pets, especially in urban settings. Cat owners are becoming more attentive to their pets' health needs, leading to increased demand for cat-specific healthcare products and services. This segment is experiencing growth in areas such as routine health check-ups, vaccinations, and chronic disease management. Additionally, there is a rising interest in specialized nutrition and wellness products tailored for cats, including age-specific and breed-specific formulations. The market is also witnessing a widespread adoption of advanced diagnostic and treatment options for cats, reflecting the growing concern for their well-being among pet owners.

The equine segment, though smaller compared to dogs and cats, plays a vital role in the market. This segment caters to the health and wellness needs of horses, with a focus on both preventive care and treatment of illnesses. The market is driven by the needs of professional breeders, equestrian sports enthusiasts, and individual horse owners. There is a significant demand for vaccinations, parasite control products, and nutritional supplements specific to horses. Additionally, the segment is seeing advancements in diagnostic and treatment technologies, including imaging and surgical procedures tailored for equine health. The rising interest in equestrian sports and recreational horse riding also contributes to the steady growth of this segment.

Breakup by Product:

Vaccines

Pharmaceuticals

Feed Additives

Diagnostics

Others

A detailed breakup and analysis of the market based on the product have also been provided in the report. This includes vaccines, pharmaceuticals, feed additives, diagnostics, and others.

Vaccines play a vital role in preventing various infectious diseases in pets. This segment is driven by increasing awareness about the importance of regular vaccinations for pets, along with the development of new and more effective vaccines. Innovations in vaccine technology, such as recombinant vaccines and DNA vaccines, are enhancing the efficacy and safety profiles of these products. The demand for vaccines is also being strengthened by stringent regulations and recommendations by veterinary bodies, emphasizing the necessity of vaccinations as a part of preventive healthcare for companion animals.

The pharmaceuticals segment is a major component of the companion animal health market, encompassing a wide range of products, including anti-infectives, anti-inflammatories, and medicines for chronic conditions. This segment is expanding owing to the increasing prevalence of numerous health issues in pets, such as arthritis, diabetes, and heart disease. The development of new and more effective drugs, along with the growing trend of personalized medicine, is further driving this segment. Moreover, the rise in pet insurance and veterinary care spending is enabling pet owners to afford these pharmaceutical treatments, thereby contributing to the growth of this segment.

Feed additives play a significant role in the companion animal health market, focusing on improving the nutrition and overall health of pets. This segment includes a range of products like vitamins, minerals, amino acids, and probiotics, which are essential for the proper growth, development, and health maintenance of companion animals. The escalating demand for premium and specialized pet foods, coupled with the heightened understanding of the importance of nutrition in animal health, is fostering the growth of this segment. Additionally, the development of new and innovative feed additives that cater to specific health needs, such as digestive health or immune support, is further enhancing the market potential.

The diagnostics segment in the companion animal health market is gaining momentum,

propelled by the increasing adoption of advanced diagnostic methods for accurate and early detection of diseases in pets. This segment includes a variety of diagnostic tools and services, such as blood tests, imaging, and molecular diagnostics. The growth in this segment is catalyzed by technological advancements, which are making diagnostics more accessible and cost-effective. Pet owners' growing preference for preventive healthcare measures, coupled with the need for regular health monitoring of aging pets, is also accelerating the expansion of this market segment. The integration of digital technologies, such as telemedicine, is further facilitating the growth and reach of diagnostic services in the companion animal health sphere.

Breakup by End User:

Point-of-Care Testing/In-House Testing

Veterinary Hospitals and Clinics

Others

Veterinary hospitals and clinics represent the leading market segment

The report has provided a detailed breakup and analysis of the market based on the end user. This includes point-of-care testing/in-house testing, veterinary hospitals and clinics, and others. According to the report, veterinary hospitals and clinics represented the largest segment.

Veterinary hospitals and clinics serve as the primary care providers for companion animals. This segment includes a comprehensive range of services, from routine check-ups and vaccinations to advanced surgical procedures and emergency care. The dominance of this segment is attributed to the comprehensive care these facilities provide, backed by skilled veterinary professionals and advanced medical technologies. Veterinary hospitals and clinics are essential for diagnosing and treating more complex health conditions in pets, which cannot be addressed through in-house testing alone. The rising focus on preventive healthcare, along with the increasing prevalence of various animal diseases and conditions, continues to drive pet owners to seek professional veterinary services, thereby sustaining the growth and significance of this market segment.

The point-of-care testing (POCT) or in-house testing segment in the companion animal health market caters to the growing demand for convenient and rapid diagnostic testing. This segment includes a range of diagnostic tools and kits used by pet owners or veterinarians at home or in non-laboratory settings. The growth in this segment is

supported by the increasing preference for immediate results and the convenience of conducting tests without the need for specialized equipment or external laboratory services. Technological advancements have led to the development of more accurate and user-friendly testing kits, making in-house testing a viable option for routine health monitoring and disease screening in pets. This segment is particularly appealing to pet owners who seek proactive management of their pets' health, offering an efficient way to monitor chronic conditions or perform regular health check-ups.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America leads the market, accounting for the largest companion animal health market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia-

Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

North America held the biggest market share due to high pet ownership rates, substantial spending on pet care, and the presence of advanced veterinary healthcare infrastructure. This region is characterized by a strong emphasis on preventive care and wellness for pets, fueling the demand for a wide range of products and services, from vaccines to diagnostic tools. Additionally, the presence of major market players and continuous investment in research and development (R&D) in this region contribute to its leading position. The emerging trend of pet humanization, where pets are treated as family members, further propels the growth of the market in North America.

The Asia Pacific region is also experiencing rapid growth in the companion animal health market, driven by increasing pet ownership, rising disposable incomes, and heightened awareness of pet health and wellness. Urbanization and changing lifestyles are leading to a greater adoption of pets, particularly in emerging economies. The region is witnessing an increase in demand for quality veterinary services and healthcare products. Additionally, the expansion of veterinary healthcare facilities and the entry of international players into these markets are contributing to the growth of the market in the Asia Pacific region.

Europe holds a significant share of the companion animal health market, supported by high standards of pet care, well-established veterinary healthcare systems, and stringent animal health regulations. The market in this region is propelled by a strong focus on preventive care, advanced diagnostics, and treatment options. European pet owners are typically well-informed and willing to invest in the health and well-being of their pets, further supporting market growth. Moreover, Europe's strong regulatory framework ensures the availability of high-quality and safe animal health products, contributing to the growth of the market in this region.

The companion animal health market in Latin America is growing steadily, with an increasing number of households owning pets and a heightened awareness of pet health needs. The market is expanding owing to the gradual improvement in veterinary healthcare infrastructure and services. Economic growth in various countries in this region is enabling pet owners to spend more on pet care, including preventive and therapeutic products. However, the market still faces challenges, such as limited access to advanced veterinary care in some areas, which influences the overall growth

potential of this segment.

The Middle East & Africa region, though smaller compared to other segments, is gradually emerging in the companion animal health market. This growth is attributed to increasing pet ownership in urban areas and rising awareness of pet health and welfare. The market is also benefiting from the growing investment in veterinary services and infrastructure. However, the region faces unique challenges, such as varying levels of economic development and cultural attitudes toward pet ownership, which impact the market dynamics. Nonetheless, the increasing focus on animal health and welfare in these regions offers potential for growth in the companion animal health sector.

Leading Key Players in the Companion Animal Health Industry:

Numerous key players in the companion animal health market are actively engaging in research and development (R&D) to innovate new products and services, focusing on areas like advanced therapeutics, diagnostics, and preventive care. They are also expanding their global reach through strategic partnerships, mergers, and acquisitions, aiming to enhance their product portfolios and market presence. Additionally, these companies are investing in digital technologies, such as telemedicine and mobile applications, to improve accessibility and efficiency in veterinary care. Emphasizing customer education and awareness programs, they aim to increase the understanding of pet health needs, thereby driving market growth and customer loyalty.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Agrolabo S.p.A.

Boehringer Ingelheim

Ceva Santé Animale

Dechra Pharmaceuticals PLC

Elanco Animal Health Incorporated

IDEXX Laboratories Inc.

Indian Immunologicals Limited (National Dairy Development Board)

Merck & Co. Inc.

Norbrook Laboratories

Vetoquinol SA

Virbac

Zoetis Inc.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Latest News:

In September 2023, Ceva Santé Animale (Ceva), the global animal health company, announced the launch of its highly anticipated 2024 “Call for Projects”. This worldwide event aims to discover and support new, innovative solutions for the well-being and care of companion animals and their pet parents.

In October 2023, Zoetis announced the U.S. commercial launch of Librela (bedinvetmab injection), demonstrating the company’s advanced leadership in canine innovation and dedication to providing individualized care to address the health needs of dogs. Librela was approved by the U.S. Food and Drug Administration (FDA) on May 5, 2023, as a once-monthly injectable monoclonal antibody for the control of pain associated with osteoarthritis (OA) in dogs, helping to improve the mobility and quality of life for dogs with OA pain.

Key Questions Answered in This Report

1. What was the size of the global companion animal health market in 2023?
2. What is the expected growth rate of the global companion animal health market during 2024-2032?
3. What has been the impact of COVID-19 on the global companion animal health market?
4. What are the key factors driving the global companion animal health market?
5. What is the breakup of the global companion animal health market based on the animal type?
6. What is the breakup of the global companion animal health market based on the end user?
7. What are the key regions in the global companion animal health market?
8. Who are the key players/companies in the global companion animal health market?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL COMPANION ANIMAL HEALTH MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

6 MARKET BREAKUP BY ANIMAL TYPE

- 6.1 Dogs
 - 6.1.1 Market Trends
 - 6.1.2 Market Forecast
- 6.2 Cats
 - 6.2.1 Market Trends
 - 6.2.2 Market Forecast
- 6.3 Equine

- 6.3.1 Market Trends
- 6.3.2 Market Forecast
- 6.4 Others
 - 6.4.1 Market Trends
 - 6.4.2 Market Forecast

7 MARKET BREAKUP BY PRODUCT

- 7.1 Vaccines
 - 7.1.1 Market Trends
 - 7.1.2 Market Forecast
- 7.2 Pharmaceuticals
 - 7.2.1 Market Trends
 - 7.2.2 Market Forecast
- 7.3 Feed Additives
 - 7.3.1 Market Trends
 - 7.3.2 Market Forecast
- 7.4 Diagnostics
 - 7.4.1 Market Trends
 - 7.4.2 Market Forecast
- 7.5 Others
 - 7.5.1 Market Trends
 - 7.5.2 Market Forecast

8 MARKET BREAKUP BY END USER

- 8.1 Point-of-care Testing/In-house Testing
 - 8.1.1 Market Trends
 - 8.1.2 Market Forecast
- 8.2 Veterinary Hospitals and Clinics
 - 8.2.1 Market Trends
 - 8.2.2 Market Forecast
- 8.3 Others
 - 8.3.1 Market Trends
 - 8.3.2 Market Forecast

9 MARKET BREAKUP BY REGION

- 9.1 North America

- 9.1.1 United States
 - 9.1.1.1 Market Trends
 - 9.1.1.2 Market Forecast
- 9.1.2 Canada
 - 9.1.2.1 Market Trends
 - 9.1.2.2 Market Forecast
- 9.2 Asia-Pacific
 - 9.2.1 China
 - 9.2.1.1 Market Trends
 - 9.2.1.2 Market Forecast
 - 9.2.2 Japan
 - 9.2.2.1 Market Trends
 - 9.2.2.2 Market Forecast
 - 9.2.3 India
 - 9.2.3.1 Market Trends
 - 9.2.3.2 Market Forecast
 - 9.2.4 South Korea
 - 9.2.4.1 Market Trends
 - 9.2.4.2 Market Forecast
 - 9.2.5 Australia
 - 9.2.5.1 Market Trends
 - 9.2.5.2 Market Forecast
 - 9.2.6 Indonesia
 - 9.2.6.1 Market Trends
 - 9.2.6.2 Market Forecast
 - 9.2.7 Others
 - 9.2.7.1 Market Trends
 - 9.2.7.2 Market Forecast
- 9.3 Europe
 - 9.3.1 Germany
 - 9.3.1.1 Market Trends
 - 9.3.1.2 Market Forecast
 - 9.3.2 France
 - 9.3.2.1 Market Trends
 - 9.3.2.2 Market Forecast
 - 9.3.3 United Kingdom
 - 9.3.3.1 Market Trends
 - 9.3.3.2 Market Forecast
 - 9.3.4 Italy

- 9.3.4.1 Market Trends
- 9.3.4.2 Market Forecast
- 9.3.5 Spain
 - 9.3.5.1 Market Trends
 - 9.3.5.2 Market Forecast
- 9.3.6 Russia
 - 9.3.6.1 Market Trends
 - 9.3.6.2 Market Forecast
- 9.3.7 Others
 - 9.3.7.1 Market Trends
 - 9.3.7.2 Market Forecast
- 9.4 Latin America
 - 9.4.1 Brazil
 - 9.4.1.1 Market Trends
 - 9.4.1.2 Market Forecast
 - 9.4.2 Mexico
 - 9.4.2.1 Market Trends
 - 9.4.2.2 Market Forecast
 - 9.4.3 Others
 - 9.4.3.1 Market Trends
 - 9.4.3.2 Market Forecast
- 9.5 Middle East and Africa
 - 9.5.1 Market Trends
 - 9.5.2 Market Breakup by Country
 - 9.5.3 Market Forecast

10 SWOT ANALYSIS

- 10.1 Overview
- 10.2 Strengths
- 10.3 Weaknesses
- 10.4 Opportunities
- 10.5 Threats

11 VALUE CHAIN ANALYSIS

12 PORTERS FIVE FORCES ANALYSIS

- 12.1 Overview

- 12.2 Bargaining Power of Buyers
- 12.3 Bargaining Power of Suppliers
- 12.4 Degree of Competition
- 12.5 Threat of New Entrants
- 12.6 Threat of Substitutes

13 PRICE ANALYSIS

14 COMPETITIVE LANDSCAPE

- 14.1 Market Structure
- 14.2 Key Players
- 14.3 Profiles of Key Players
 - 14.3.1 Agrolabo S.p.A.
 - 14.3.1.1 Company Overview
 - 14.3.1.2 Product Portfolio
 - 14.3.2 Boehringer Ingelheim
 - 14.3.2.1 Company Overview
 - 14.3.2.2 Product Portfolio
 - 14.3.3 Ceva Sant? Animale
 - 14.3.3.1 Company Overview
 - 14.3.3.2 Product Portfolio
 - 14.3.4 Dechra Pharmaceuticals PLC
 - 14.3.4.1 Company Overview
 - 14.3.4.2 Product Portfolio
 - 14.3.4.3 Financials
 - 14.3.5 Elanco Animal Health Incorporated
 - 14.3.5.1 Company Overview
 - 14.3.5.2 Product Portfolio
 - 14.3.5.3 Financials
 - 14.3.6 IDEXX Laboratories Inc.
 - 14.3.6.1 Company Overview
 - 14.3.6.2 Product Portfolio
 - 14.3.6.3 Financials
 - 14.3.6.4 SWOT Analysis
 - 14.3.7 Indian Immunologicals Limited (National Dairy Development Board)
 - 14.3.7.1 Company Overview
 - 14.3.7.2 Product Portfolio
 - 14.3.8 Merck & Co. Inc.

- 14.3.8.1 Company Overview
- 14.3.8.2 Product Portfolio
- 14.3.8.3 Financials
- 14.3.8.4 SWOT Analysis
- 14.3.9 Norbrook Laboratories
 - 14.3.9.1 Company Overview
 - 14.3.9.2 Product Portfolio
- 14.3.10 Vetoquinol SA
 - 14.3.10.1 Company Overview
 - 14.3.10.2 Product Portfolio
 - 14.3.10.3 Financials
- 14.3.11 Virbac
 - 14.3.11.1 Company Overview
 - 14.3.11.2 Product Portfolio
 - 14.3.11.3 Financials
 - 14.3.11.4 SWOT Analysis
- 14.3.12 Zoetis Inc.
 - 14.3.12.1 Company Overview
 - 14.3.12.2 Product Portfolio
 - 14.3.12.3 Financials
 - 14.3.12.4 SWOT Analysis

List Of Tables

LIST OF TABLES

Table 1: Global: Companion Animal Health Market: Key Industry Highlights, 2023 and 2032

Table 2: Global: Companion Animal Health Market Forecast: Breakup by Animal Type (in Million US\$), 2024-2032

Table 3: Global: Companion Animal Health Market Forecast: Breakup by Product (in Million US\$), 2024-2032

Table 4: Global: Companion Animal Health Market Forecast: Breakup by End User (in Million US\$), 2024-2032

Table 5: Global: Companion Animal Health Market Forecast: Breakup by Region (in Million US\$), 2024-2032

Table 6: Global: Companion Animal Health Market: Competitive Structure

Table 7: Global: Companion Animal Health Market: Key Players

List Of Figures

LIST OF FIGURES

Figure 1: Global: Companion Animal Health Market: Major Drivers and Challenges

Figure 2: Global: Companion Animal Health Market: Sales Value (in Billion US\$), 2018-2023

Figure 3: Global: Companion Animal Health Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 4: Global: Companion Animal Health Market: Breakup by Animal Type (in %), 2023

Figure 5: Global: Companion Animal Health Market: Breakup by Product (in %), 2023

Figure 6: Global: Companion Animal Health Market: Breakup by End User (in %), 2023

Figure 7: Global: Companion Animal Health Market: Breakup by Region (in %), 2023

Figure 8: Global: Companion Animal Health (Dogs) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 9: Global: Companion Animal Health (Dogs) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 10: Global: Companion Animal Health (Cats) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 11: Global: Companion Animal Health (Cats) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 12: Global: Companion Animal Health (Equine) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 13: Global: Companion Animal Health (Equine) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 14: Global: Companion Animal Health (Other Animal Types) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 15: Global: Companion Animal Health (Other Animal Types) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 16: Global: Companion Animal Health (Vaccines) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 17: Global: Companion Animal Health (Vaccines) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 18: Global: Companion Animal Health (Pharmaceuticals) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 19: Global: Companion Animal Health (Pharmaceuticals) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 20: Global: Companion Animal Health (Feed Additives) Market: Sales Value (in

Million US\$), 2018 & 2023

Figure 21: Global: Companion Animal Health (Feed Additives) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 22: Global: Companion Animal Health (Diagnostics) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 23: Global: Companion Animal Health (Diagnostics) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 24: Global: Companion Animal Health (Other Products) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 25: Global: Companion Animal Health (Other Products) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 26: Global: Companion Animal Health (Point-of-care Testing/In-house Testing) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 27: Global: Companion Animal Health (Point-of-care Testing/In-house Testing) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 28: Global: Companion Animal Health (Veterinary Hospitals and Clinics) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 29: Global: Companion Animal Health (Veterinary Hospitals and Clinics) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 30: Global: Companion Animal Health (Other End Users) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 31: Global: Companion Animal Health (Other End Users) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 32: North America: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 33: North America: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 34: United States: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 35: United States: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 36: Canada: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 37: Canada: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 38: Asia-Pacific: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 39: Asia-Pacific: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 40: China: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 41: China: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 42: Japan: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 43: Japan: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 44: India: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 45: India: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 46: South Korea: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 47: South Korea: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 48: Australia: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 49: Australia: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 50: Indonesia: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 51: Indonesia: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 52: Others: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 53: Others: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 54: Europe: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 55: Europe: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 56: Germany: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 57: Germany: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 58: France: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 59: France: Companion Animal Health Market Forecast: Sales Value (in Million

US\$), 2024-2032

Figure 60: United Kingdom: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 61: United Kingdom: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 62: Italy: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 63: Italy: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 64: Spain: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 65: Spain: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 66: Russia: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 67: Russia: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 68: Others: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 69: Others: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 70: Latin America: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 71: Latin America: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 72: Brazil: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 73: Brazil: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 74: Mexico: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 75: Mexico: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 76: Others: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 77: Others: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 78: Middle East and Africa: Companion Animal Health Market: Sales Value (in Million US\$), 2018 & 2023

Figure 79: Middle East and Africa: Companion Animal Health Market: Breakup by Country (in %), 2023

Figure 80: Middle East and Africa: Companion Animal Health Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 81: Global: Companion Animal Health Industry: SWOT Analysis

Figure 82: Global: Companion Animal Health Industry: Value Chain Analysis

Figure 83: Global: Companion Animal Health Industry: Porter's Five Forces Analysis

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