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# Veterinary Infectious Disease Diagnostics Market Report by Technology (Immunodiagnostics, Molecular Diagnostics, and Others), Animal Type (Companion Animals, Food Producing Animals), Infection Type (Bacterial Infections, Viral Infections, Parasitic Infections, and Others), End User (Reference Laboratories, Veterinary Laboratories and Clinics, Point of Care/In House Testing, Research Institutes and Universities), and Region 2024-2032

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## Abstracts

The global veterinary infectious disease diagnostics market size reached US$ 2.0 Billion in 2023. Looking forward, IMARC Group expects the market to reach US$ 4.0 Billion by 2032, exhibiting a growth rate (CAGR) of 7.4% during 2024-2032. Increasing disease prevalence in pets and livestock, rising pet owner awareness, surging technological advancements, the need for accurate diagnostics, adoption of advanced tools, heightened pet health concerns, expanding veterinary infrastructure, government initiatives for zoonotic disease prevention, and enhanced research funding are factors fueling the market growth.

Veterinary Infectious Disease Diagnostics Market Analysis:

Major Market Drivers: Globally, the rising prevalence of zoonotic diseases is significantly increasing the demand for advanced diagnostic solutions, creating a positive outlook for the market. Additionally, increasing government initiatives and funding for animal healthcare is driving the veterinary infectious disease diagnostics market growth. Moreover, the expansion of livestock industry and

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escalating initiatives by major players for conducting research and development (R&D) activity is propelling the market growth. Additionally, increasing utilization of point-of-care (POC) diagnostics, burgeoning telemedicine usage for veterinary care, and growing consumer awareness about animal welfare and quality standards are further boosting the veterinary infectious disease diagnostics demand.

Key Market Trends: The shifting preference toward molecular diagnostics due to their superior sensitivity and specificity is one of the primary market trends. Moreover, the surging use of clustered regularly interspaced short palindromic repeats (CRISPR) for diagnostics as it can be operated on-site is another factor facilitating the market growth. Additionally, the rising integration of artificial intelligence (AI) and machine learning (ML), especially in diagnostic tools, to produce more accurate results is fostering a positive veterinary infectious disease diagnostics market outlook. In line with this, the increasing demand for companion animals and the gradual shift towards multiplex diagnostic assays that detect a variety of pathogens at the same time are fueling the market growth. Furthermore, the collaborations between veterinary practices and diagnostic laboratories and burgeoning demand for point-of-care (POC) diagnostic solutions are driving the market forward.

Geographical Trends: As per the veterinary infectious disease diagnostics market forecast, North America leads the market due to the presence of advance healthcare infrastructure, along with growing number pet ownership and burgeoning investment in animal health. Moreover, the increasing focus on research and development (R&D) by key players and favorable government policies are supporting the regional market growth. Europe holds a considerable share in the market due to stringent animal health regulations and the presence of a number of key market players. Furthermore, in Asia Pacific, the growing awareness of animal health, the easy availability of infectious diagnostics, and burgeoning government funding in animal health are accelerating the market growth.

Competitive Landscape: Some of the major market players in the veterinary infectious disease diagnostics industry include Abbott Laboratories, Biom?rieux SA, Creative Diagnostics, HESKA Corporation, Innovative Diagnostics, IDEXX Laboratories Inc., Neogen Corporation, Qiagen N.V., Randox Laboratories Ltd, Thermo Fisher Scientific Inc, and Virbac, among many others.

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Challenges and Opportunities: As per the veterinary infectious disease diagnostics market report, the burgeoning cost of diagnostic tools is one of the primary factors hindering the market growth. Additionally, regulatory obstacles and complex approval processes are creating various challenges for the market players, which is another factor restraining the market growth. However, the market also offers various opportunities, such as the increasing prevalence of infectious diseases in animals and rising pet ownership are establishing a huge demand for advanced diagnostics. Moreover, rapid developments in technology, including the emergence of convenient and easy-to-use diagnostic devices and the growing concern about veterinary health and welfare are factors providing a considerable boost to the veterinary infectious disease diagnostics market revenue.

Veterinary Infectious Disease Diagnostics Market Trends:

Growing Prevalence of Infectious Diseases in Pets and Livestock

Increasing prevalence of infectious diseases among pets and livestock is accelerating the market growth. For instance, feline leukemia virus (FeLV) is one of the most common infectious diseases in cats, affecting between 2-3% of felines in the US and Canada. The risk is further amplified by the surging interactions among pets and humans, which is further escalating the chances of disease transmission. Moreover, the rapid urbanization, changes in animal husbandry practices, and the rising number of diagnosed patients are supporting the market growth. Another factor boosting the veterinary infectious disease diagnostics market value is the burgeoning demand for accurate and timely diagnostics that can assist with efficient control and containment of these diseases.

Increasing Awareness Among Pet Owners

Rising awareness among pet owners about the importance of early disease detection is a crucial factor driving the market growth. With pets being considered integral family members, owners are increasingly prioritizing their health and well-being. This heightened awareness has led to a growing demand for regular health check-ups, preventive measures, and early diagnostic tests. Additionally, the availability of advanced diagnostic tools and technologies has made it easier for pet owners to access high-quality veterinary care, further driving the demand for infectious disease diagnostics.

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Technological Advancements

According to the market overview, veterinary infectious disease diagnostics are witnessing considerably demand due to rapid technological advancements. Improvements in diagnostic have greatly improved the efficiency and accuracy of the results, which is further fueling the market growth. Furthermore, the introduction of molecular diagnostic technologies, such as polymerase chain reaction (PCR), designed to improve detection and identification in animal infectious diseases is facilitating the market growth. Apart from this, the incorporation of digital health tools, such as automated analyzers and telemedicine platforms, have simplified the diagnostics process, which is further supporting the market growth.

Veterinary Infectious Disease Diagnostics Market 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 technology, animal type, infection type and end user.

Breakup by Technology:

Immunodiagnostics

Molecular Diagnostics

Others

Immunodiagnostics accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the technology. This includes immunodiagnostics, molecular diagnostics, and others. According to the report, immunodiagnostics represented the largest segment.

According to the veterinary infectious disease diagnostics market research report, the immunodiagnostics segment holds the largest market share due to the increasing demand for accurate disease detection. Immunodiagnostic tests, including enzyme-linked immunosorbent assays (ELISA) and immunofluorescence assays (IFA), are

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essential for their ability to specifically detect antibodies or antigens related to infectious diseases. This precision is critical in identifying pathogens and diagnosing diseases at early stages, which is crucial for effective treatment and disease management. As veterinary care becomes more sophisticated, there is a growing expectation for highly reliable diagnostic tools that can provide definitive results quickly. The escalating prevalence of infectious diseases in pets and livestock has heightened the need for such accurate diagnostic solutions.

Breakup by Animal Type:

Companion Animals

Food Producing Animals

Companion animals holds the largest share of the industry

A detailed breakup and analysis of the market based on the animal type have also been provided in the report. This includes companion animals and food producing animals. According to the report, companion animals accounted for the largest market share.

The companion animals segment in the veterinary infectious disease diagnostics market is driven by the focus on pet health and wellness, as well as advancements in diagnostic technology. Furthermore, the increasing prioritization of early disease detection by pet owners, who are more aware of the benefits of proactive health management are driving the market growth. This heightened awareness results in a growing demand for diagnostic services that can identify diseases before they become severe, leading to better health outcomes for pets. The segment is also driven by the availability of advanced diagnostic tools, such as molecular assays and rapid point-of-care tests, which offer accurate and timely results. These innovations enable veterinarians to diagnose and treat infections more effectively, enhancing the overall quality of care for companion animals.

Breakup by Infection Type:

Bacterial Infections

Viral Infections

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Parasitic Infections

Others

Bacterial infections represent the leading market segment

The report has provided a detailed breakup and analysis of the market based on the infection type. This includes bacterial infections, viral infections, parasitic infections, and others. According to the report, bacterial infections represented the largest segment.

The bacterial infections segment in the veterinary infectious disease diagnostics market is driven by the burgeoning prevalence of bacterial diseases among animals, which necessitates advanced diagnostic tools for effective management and control. The rising incidence of bacterial infections such as leptospirosis, tuberculosis, and salmonella in both pets and livestock fuels demand for precise diagnostic solutions. The growing awareness of the impact of bacterial diseases on animal health and productivity also drives the need for robust diagnostic methods to ensure early detection and intervention. Additionally, the segment is driven by the shifting focus on food safety, as bacterial infections in livestock can lead to contamination of the food supply, prompting stringent testing and monitoring requirements. The expansion of veterinary healthcare infrastructure and services, particularly in emerging economies, supports the growth of this segment by enhancing access to diagnostic technologies.

Breakup by End User:

Reference Laboratories

Veterinary Laboratories and Clinics

Point of Care/In House Testing

Research Institutes and Universities

Reference laboratories dominates the market

The report has provided a detailed breakup and analysis of the market based on the end user. This includes reference laboratories, veterinary laboratories and clinics, point

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of care/in house testing, and research institutes and universities. According to the report, reference laboratories represented the largest segment.

The reference laboratories segment in the veterinary infectious disease diagnostics market is driven by the escalating complexity of diagnostic testing requirements. As veterinary diagnostics become more sophisticated, reference laboratories are increasingly relied upon for their advanced capabilities and specialized expertise. The segment is driven by the surging need for accurate and comprehensive diagnostic tests that can differentiate between various pathogens and diseases. This complexity necessitates the use of highly specialized equipment and skilled personnel, which are hallmarks of reference laboratories. Additionally, the segment benefits from the increasing volume of diagnostic samples that require thorough and high-resolution analysis, further underscoring the need for reference laboratories. The rising demand for advanced testing methods, such as molecular diagnostics and genomic analysis, drives the need for specialized reference laboratories capable of conducting these tests with high precision.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

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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 veterinary infectious disease diagnostics market share

The 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 represents the largest regional market for veterinary infectious disease diagnostics.

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The North American veterinary infectious disease diagnostics market is driven by the growing prevalence of infectious diseases among pets and livestock. The rising incidence of diseases such as canine distemper, feline leukemia, and various zoonotic infections in the region underscores the need for effective diagnostic solutions. The regional market is also driven by the burgeoning awareness among pet owners about the importance of early detection and prevention of diseases. Pet owners in North America are more informed and proactive about their pets' health, which fuels demand for advanced diagnostic services. Moreover, the surging technological advancements in veterinary diagnostics, including innovations in molecular biology, rapid testing methods, and automated analyzers, are supporting the market growth. These advancements enhance the accuracy, speed, and efficiency of diagnostic processes. Apart from this, the market is driven by the escalating focus on veterinary research and development (R&D), supported by substantial investments from both private and public sectors.

Competitive Landscape:

> The market research report has also provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the major market players in the veterinary infectious disease diagnostics industry include Abbott Laboratories, Biom?rieux SA, Creative Diagnostics, HESKA Corporation, Innovative Diagnostics, IDEXX Laboratories Inc., Neogen Corporation, Qiagen N.V., Randox Laboratories Ltd, Thermo Fisher Scientific Inc, Virbac., etc.

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

> Some of the key veterinary infectious disease diagnostics companies in the market are actively engaged in several strategic initiatives to maintain their competitive edge and drive market growth. These companies are focusing on extensive R&D to innovate and enhance diagnostic technologies. By investing heavily in R&D, they aim to introduce advanced diagnostic tools, such as molecular assays and rapid testing devices, that offer greater accuracy and speed in detecting infectious diseases. Collaboration with research institutions and academic organizations is also a priority, facilitating the development of cutting-edge technologies and solutions. Additionally, these players are

expanding their product portfolios through strategic acquisitions and partnerships, enabling them to offer a broader range of diagnostic solutions and enter new markets. They are also enhancing their manufacturing capabilities to meet the growing demand for high-quality diagnostic products. Key players are also adopting digital technologies and data analytics to improve diagnostic processes and provide integrated solutions that offer real-time results and predictive insights.

Veterinary Infectious Disease Diagnostics Market News:

In 2023, IDEXX Laboratories introduced a pioneering veterinary diagnostic test to detect kidney injury in cats and dogs. This test, which is the first of its kind, is part of IDEXX's strategy to expand its portfolio with advanced diagnostic solutions that address unmet needs in veterinary care. The new test is expected to significantly improve early diagnosis and treatment outcomes for pets, enhancing their quality of life and extending lifespans.

In 2023, Mars acquired HESKA Corporation to integrate HESKA into Mars Petcare’s Science & Diagnostics division, significantly broadening access to advanced diagnostic technologies and accelerating research and development initiatives. This acquisition is expected to enhance HESKA’s capabilities in delivering comprehensive diagnostic solutions, including point-of-care diagnostics, telemedicine, and innovative technologies for veterinary professionals globally.

In 2024, Neogen Corporation expanded its product line with the introduction of the SureKill Gel Bait Pro Applicator. This new addition to the SureKill line aims to enhance pest control solutions, particularly in environments where animal health is a priority. The applicator is designed to provide efficient and effective pest control, ensuring safer and healthier conditions for livestock and pets.

Key Questions Answered in This Report:

How has the global veterinary infectious disease diagnostics market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global veterinary

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infectious disease diagnostics market?

What is the impact of each driver, restraint, and opportunity on the global veterinary infectious disease diagnostics market?

What are the key regional markets?

Which countries represent the most attractive veterinary infectious disease diagnostics market?

What is the breakup of the market based on the technology?

Which is the most attractive technology in the veterinary infectious disease diagnostics market?

What is the breakup of the market based on the animal type?

Which is the most attractive animal type in the veterinary infectious disease diagnostics market?

What is the breakup of the market based on the infection type?

Which is the most attractive infection type in the veterinary infectious disease diagnostics market?

What is the breakup of the market based on the end user?

Which is the most attractive end user in the veterinary infectious disease diagnostics market?

What is the competitive structure of the market?

Who are the key players/companies in the global veterinary infectious disease diagnostics market?

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