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Veterinary Molecular Diagnostics Market Report by Product (Kits and Reagents, Instruments, Software and Services), Technology (Real Time PCR, Microarray, DNA Sequencing), Animal Type (Companion Animal, Livestock Animal), Disease Type (Vector-borne Diseases, Respiratory Pathogens, Diarrhea Pathogens, and Others), End User (Veterinary Hospitals, Clinical Laboratories, Research Institutes), and Region 2025-2033

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Abstracts

The global veterinary molecular diagnostics market size reached USD 745.6 Million in 2024. Looking forward, IMARC Group expects the market to reach USD 1,482.2 Million by 2033, exhibiting a growth rate (CAGR) of 7.54% during 2025-2033. The growing adoption of pets among the masses, increasing advancements in molecular diagnostic technologies, and rising implementation of stringent regulatory guidelines and quality control standards to standardize molecular diagnostic tests in veterinary practice are some of the major factors propelling the market growth.

Veterinary Molecular Diagnostics Market Analysis:

Major Market Drivers: Increasing pet ownership is one of the significant factors driving the growth of the market. Additionally, the rising demand for molecular diagnostics that can rapidly and accurately detect infectious agents in animals, helping to prevent disease transmission to humans and safeguard public health, is impelling the growth of the market.

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Key Market Trends: The rising utilization of personalized medicine in veterinary care to tailor treatment plans and predict disease susceptibility is creating a positive outlook for the overall market.

Competitive Landscape: Some of the leading veterinary molecular diagnostics companies include Biochek B.V., bioM?rieux SA, HealthGene Corporation, Heska Corporation, IDEXX Laboratories Inc., INDICAL BIOSCIENCE GmbH, Ingenetix GmbH, NEOGEN Corporation, Qiagen N.V, Thermo Fisher Scientific Inc., Veterinary Molecular Diagnostics Inc., and Zoetis Inc., among others.

Geographical Trends: According to the report, North America accounted for the largest market share. This can be attributed to the rising adoption of pets among the masses to enjoy their companionship. Besides this, the increasing affordability of molecular diagnostic tests, making them a viable option for a wider range of veterinary practices, is contributing to the growth of the market.

Challenges and Opportunities: Challenges in veterinary molecular diagnostics include the need for cost-effective and user-friendly technologies, as well as the requirement for extensive validation to ensure accuracy across diverse animal species. Opportunities lie in the development of rapid, point-of-care assays for timely diagnosis and the potential for personalized treatment plans based on genetic information, advancing animal health care.

Veterinary Molecular Diagnostics Market Trends:

Growing Adoption of Pets Among the Masses

The growing adoption of pets among the masses is positively influencing the veterinary molecular diagnostics market. This surge in pet ownership is resulting in a higher demand for veterinary services, including diagnostics. For instance, according to the pet population data published in March 2021 by the Pet Food Manufacturers Association, over 59% of households in the United Kingdom had pets, with over 32.6 million pets in 2021. The trend of treating pets as family members is growing, which in turn is augmenting the veterinary molecular diagnostics market demand. Moreover, dogs and cats are the popular pets adopted by pet parents. For instance, the dog population was around 604.5 million in 2022, whereas the cat population was approx. 408.2 million globally. Besides this, the American Pet Products Association published in April 2022 that the total American pet industry expenditure reached US$ 123.6 Billion in 2021, up

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from US$ 103.6 Billion in 2020. The rise in animal health expenditure is expected to drive the growth of the veterinary molecular diagnostics market, as a significant portion of pet owners are expected to use advanced diagnostic modalities for various disease conditions in animals and propel the veterinary molecular diagnostics market's recent price.

Rising Prevalence of Animal Diseases

The rising prevalence of animal diseases is bolstering the growth of the veterinary molecular diagnostics market. According to a study published by the University of Calgary in June 2021, conducted to investigate the infections of Echinococcus multilocularis in domestic dogs to infer their potential role in zoonotic transmission, stated that Echinococcus multilocularis, a parasitic helminth of the northern hemisphere (Alberta, Canada), normally cycles through definitive and intermediate hosts. But in urban areas, domestic dogs can also become hosts for this parasite, which could become a significant risk factor to humans due to their proximity. Besides this, it is estimated that one in five farm animals is lost due to diseases each year, while many more animals suffer the effects of illness. According to an article published by Emerging Pathogen Institutes in November 2021, bovine respiratory diseases account for 75% of feedlot illnesses, and economic losses to cattle producers exceed US$ 1 Billion every year. The estimated costs for pinkeye are US$ 150 Million yearly, and losses to dairy producers due to foot rot range from US$ 120 to US$ 350 per animal. Such increasing losses and genetic disorders among animals are expected to drive the demand for veterinary molecular diagnostics, thereby augmenting the veterinary molecular diagnostics market share.

Increasing Advancements in Molecular Diagnostic Technologies

The increasing advancements in molecular diagnostic technologies are bolstering the growth of the market. Cutting-edge molecular diagnostic technologies, such as polymerase chain reaction (PCR), next-generation sequencing (NGS), and microarray analysis, are continually evolving to provide veterinarians with unparalleled insights into the health of animals. Moreover, various key market players are launching improved diagnostics kits and instruments to facilitate quality diagnosis and treatments. For instance, in April 2022, Carolina Liquid Chemistries Corp of Greensboro signed a semi-exclusive agreement to distribute a portable analyzer for the US veterinary market. The company distributed the SeamatySMT-120 VP veterinary automated chemistry analyzer, a compact, fully automatic chemistry, electrolyte immunoassay, and coagulation analyzer for animal health diagnosis. Similarly, in September 2021, Micro

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Vet Diagnostics launched Micro-chem II, a completely new chemistry, electrolyte, immunoassay, and coagulation analyzer for animal health, producing accurate reference and laboratory-quality results. Such innovations are enhancing the efficiency of veterinary laboratories and enabling quicker turnaround times for test results, which is anticipated to propel veterinary molecular diagnostics market revenue in the coming years.

Global Veterinary Molecular Diagnostics 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 from 2025-2033. Our report has categorized the market based on product, technology, animal type, disease type, and end user.

Breakup by Product:

- Kits and Reagents
- Instruments
- Software and Services

Kits and reagents dominate the market

The veterinary molecular diagnostics market report has provided a detailed breakup and analysis of the market based on the product. This includes kits and reagents, instruments, and software and services. According to the report, kits and reagents represented the largest segment.

In veterinary molecular diagnostics, various kits and reagents are required to conduct tests and experiments to detect and analyze nucleic acids from animal samples. These molecular diagnostic tools are used for a wide range of purposes, including disease detection, genotyping, pathogen identification, and genetic research in animals. Kits and reagents for next-generation sequencing (NGS) are employed to characterize the genomes of pathogens, aiding in the study of their evolution, drug resistance, and virulence factors. They also enable the study of epigenetic modifications in animal DNA, providing insights into gene regulation and potential links between epigenetic changes and disease susceptibility.

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Breakup by Technology:

Real Time PCR

Microarray

DNA Sequencing

Real time PCR holds the largest share in the market

A detailed breakup and analysis of the market based on the technology has also been provided in the report. This includes real time PCR, microarray, and DNA sequencing. According to the report, real time PCR accounted for the largest market share.

Real-time PCR (Polymerase Chain Reaction) in Veterinary Molecular Diagnostics is a molecular biology technique used to amplify and quantify DNA in real-time during the PCR process. It is a sensitive and accurate method for measuring the amount of a target DNA or RNA molecule in a biological sample. Real-time PCR is widely employed to examine and quantify pathogens in animals, including viruses, bacteria, fungi, and parasites. It also allows for early and accurate diagnosis, enabling prompt treatment and disease management.

Breakup by Animal Type:

Companion Animal

Livestock Animal

Companion animal holds the biggest share in the market

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

As per the veterinary molecular diagnostics market statistics by IMARC, the increasing trend of pet humanization is contributing to the growth of this segment. Companion

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animals, like dogs, cats, and other pets, require veterinary molecular diagnostics to detect diseases and health conditions. Some companion animals are prone to genetic disorders or inherited diseases. The rising pet ownership and growing consciousness of pet parents regarding the health of their pets are bolstering the market for molecular diagnostics. For instance, there are over 31 million pet dogs and around 2.44 million pet cats in India. The pet cat population may reach 4.89 million by 2026. 11% of people in India own at least four pets. Molecular diagnostics can identify genetic mutations or markers associated with these conditions, allowing breeders to make informed decisions about breeding and helping veterinarians manage the health of affected animals. Molecular tests can rapidly identify the presence of infectious agents, including viruses, bacteria, and parasites. This is crucial for diagnosing and managing diseases like parvovirus, feline leukemia, and Lyme disease.

Breakup by Disease Type:

- Vector-borne Diseases
- Respiratory Pathogens
- Diarrhea Pathogens
- Others

Vector-borne diseases hold the maximum share in the market

A detailed breakup and analysis of the market based on the disease type have also been provided in the report. This includes vector-borne diseases, respiratory pathogens, diarrhea pathogens, and others. According to the report, vector-borne diseases accounted for the largest market share.

Vector-borne diseases in animals are infections that are transmitted from one animal to another through the bites of arthropod vectors, similar to how these diseases are transmitted to humans. They can have significant economic impacts on agriculture and can reduce the productivity of livestock, decrease meat and milk production, and even lead to animal deaths. Molecular diagnostic methods, like PCR, swiftly and precisely identify the genetic material of pathogens causing vector-borne diseases in animals, crucial for efficient disease control. Such techniques aid in tracking disease advancement in infected animals, enabling veterinarians to gauge infection severity and

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adapt treatment strategies accordingly.

Breakup by End User:

Veterinary Hospitals

Clinical Laboratories

Research Institutes

A detailed breakup and analysis of the market based on the end user have also been provided in the report. This includes veterinary hospitals, clinical laboratories, and research institutes.

The veterinary molecular diagnostics market overview indicates that veterinary molecular diagnostics plays a crucial role in veterinary hospitals by offering advanced tools and techniques for the monitoring and treatment of diseases in animals. They can be used in biosecurity protocols to quickly identify and isolate infected animals, preventing the spread of contagious diseases within veterinary hospitals and breeding facilities.

Veterinary molecular diagnostics plays a pivotal role in clinical laboratories dedicated to animal healthcare. These sophisticated techniques harness the power of molecular biology to provide rapid, precise, and comprehensive insights into the health of animals. Besides this, in research institutes focused on enhancing understanding of animal health, genetics, and disease mechanisms, veterinary molecular diagnostics is essential. Utilizing state-of-the-art molecular methods like Polymerase Chain Reaction (PCR), DNA sequencing, and genotyping, these institutes conduct diverse studies benefiting both animal and human welfare.

Breakup by Region:

North America

o United States

o Canada

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Asia-Pacific

o China

o Japan

o India

o South Korea

o Australia

o Indonesia

o Others

Europe

o Germany

o France

o United Kingdom

o Italy

o Spain

o Russia

o Others

Latin America

o Brazil

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o Mexico

o Others

Middle East and Africa

North America exhibits a clear dominance, accounting for the largest veterinary molecular diagnostics 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 the rising adoption of pets among the masses to enjoy their companionship. For instance, according to pet ownership statistics by Forbes, pet ownership in the U.S. jumped significantly over the past three decades. As of 2024, 66% of U.S. households (86.9 million homes) own a pet. That is up from 56% in 1988. Moreover, the rise in the prevalence of animal diseases and injuries is also a major factor bolstering the market growth. According to the 2021-2022 National Pet Owners Survey conducted by the American Pet Products Association (APPA), the annual expenditure on a routine visit for dogs accounts for US$ 242 and US$ 178 for cats in the country. Furthermore, the increasing affordability of molecular diagnostic tests, making them a viable option for a wider range of veterinary practices, is contributing to the growth of the market. Apart from this, the escalating number of product launches in North America that focus on molecular diagnostics for animals drives the market growth. For instance, in January 2022, IDEXX Laboratories, Inc. expanded its reference laboratory menu of tests and services that will enable veterinarians to better meet the challenges of diagnosing and treating cancer. Such activities are expected to positively impact the veterinary molecular diagnostics market outlook in the coming years.

Competitive Landscape:

Key market players are developing innovative and more accurate diagnostic tests for animals by creating new assays, improving the sensitivity and specificity of existing

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tests, and expanding their test menu to cover a broader range of diseases. They are also expanding their product portfolios to include a wider range of diagnostic tests for different animal species, including companion animals (dogs and cats), livestock (cattle, pigs, and poultry), and exotic animals. Top companies are establishing partnerships or collaborations with distributors and veterinary clinics in different regions to reach a global customer base. They are also incorporating automation and advanced technologies into their diagnostic platforms to streamline testing processes, reduce turnaround times, and enhance the accuracy of results.

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:

Biochek B.V.

bioM?rieux SA

HealthGene Corporation

Heska Corporation

IDEXX Laboratories Inc.

INDICAL BIOSCIENCE GmbH

Ingenetix GmbH

NEOGEN Corporation

Qiagen N.V

Thermo Fisher Scientific Inc.

Veterinary Molecular Diagnostics Inc.

Zoetis Inc.

Key Questions Answered in This Report

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1.What was the size of the global veterinary molecular diagnostics market in 2024?

2.What is the expected growth rate of the global veterinary molecular diagnostics market during 2025-2033?

3.What are the key factors driving the global veterinary molecular diagnostics market?

4.What has been the impact of COVID-19 on the global veterinary molecular diagnostics market?

5.What is the breakup of the global veterinary molecular diagnostics market based on the product?

6.What is the breakup of the global veterinary molecular diagnostics market based on the technology?

7.What is the breakup of the global veterinary molecular diagnostics market based on the animal type?

8.What is the breakup of the global veterinary molecular diagnostics market based on the disease type?

9.What are the key regions in the global veterinary molecular diagnostics market?

10.Who are the key players/companies in the global veterinary molecular diagnostics market?

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