

# **Veterinary Reference Laboratory Market Report by Technology (Clinical Chemistry, Hematology, Immunodiagnosics, Molecular Diagnostics, and Others), Application (Clinical Pathology, Toxicology, Productivity Testing, and Others), Animal Type (Livestock Animals, Companion Animals), and Region 2024-2032**

<https://marketpublishers.com/r/VC0225F9255CEN.html>

Date: August 2024

Pages: 147

Price: US\$ 3,899.00 (Single User License)

ID: VC0225F9255CEN

## **Abstracts**

The global veterinary reference laboratory market size reached US\$ 4.2 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 10.2 Billion by 2032, exhibiting a growth rate (CAGR) of 10.2% during 2024-2032. The market is thriving due to the increasing prevalence of zoonotic diseases, rapid advancements in diagnostic technologies, rising pet ownership and animal health awareness, the implementation of stringent regulatory mandates, and the expansion of veterinary healthcare facilities and services.

### **Veterinary Reference Laboratory Market Analysis:**

**Market Growth and Size:** The market is witnessing stable growth, driven by increasing demand for animal health diagnostics, rising pet ownership, growing demand for livestock production, and the need for advanced diagnostic solutions.

**Major Market Drivers:** Key drivers influencing the market growth include the rising prevalence of zoonotic diseases, advancements in veterinary diagnostics, and the heightened awareness about animal health among pet owners and farmers.

**Key Market Trends:** The key market trends involve the ongoing shift towards the adoption of molecular diagnostics and point-of-care testing (POCT) in the veterinary field. Additionally, the integration of digital technologies and automation in laboratory processes is bolstering the market growth.

**Geographical Trends:** North America leads the market due to its advanced veterinary healthcare infrastructure and high pet ownership rates. Other regions are also showing significant growth, fueled by the increasing awareness about animal health and expanding veterinary healthcare services.

**Competitive Landscape:** The market is characterized by the active involvement of key players who are investing in research and development (R&D) and strategic collaborations to enhance their service offerings and global reach. Furthermore, companies are focusing on developing innovative diagnostic methods and expanding digital solutions in veterinary care.

**Challenges and Opportunities:** The market faces various challenges, such as the high cost of advanced diagnostics and the lack of skilled veterinary professionals in some regions. However, the increasing investment in cost-effective solutions and training programs, is creating new opportunities for the market growth.

## Veterinary Reference Laboratory Market Trends:

### Increasing prevalence of zoonotic diseases

The rising prevalence of zoonotic diseases that transmit infections from animals to humans is one of the major factors propelling the market growth. In line with this, the increasing interaction between humans and animals, habitat encroachment, and the global movement of people and animals, necessitating the need for advanced diagnostic methods to detect and manage diseases, is boosting the market growth. Veterinary reference laboratories are equipped with advanced technologies and specialized expertise, making them essential for the accurate diagnosis and monitoring of zoonotic diseases. In addition to this, the growing reliance on veterinary reference laboratories due to the escalating concern over public health, coupled with the need to ensure animal welfare, is anticipated to drive the market growth.

## Rapid advancements in veterinary diagnostics

The rapid advancements in veterinary diagnostic technologies and diagnostic tools, such as the development of molecular diagnostics, immunodiagnostics, and advanced imaging technologies, are major factors providing a considerable boost to the market growth. They allow for more precise, rapid, and comprehensive diagnostic evaluations, enabling early detection and effective management of animal diseases. Moreover, the incorporation of cutting-edge technologies in veterinary reference laboratories that help in providing reliable and timely results for the treatment and control of various animal health issues, is anticipated to drive the market growth. Additionally, the ongoing research and development (R&D) in veterinary diagnostics, leading to the introduction of novel and more efficient testing methods, is offering lucrative growth opportunities for the market.

## Growing pet ownership and animal health awareness

The increasing pet ownership across the globe, driving the demand for veterinary reference laboratories for various services like diagnostics, is creating a positive outlook for the market growth. Moreover, the rising number of pets, coupled with the growing awareness among pet owners about animal health and wellness, is acting as a growth-inducing factor. In line with this the increasing investment by pet owners in quality healthcare for pets, which includes regular health check-ups and diagnostic tests, is providing an impetus to the market growth. Along with this, the heightened utilization of veterinary reference laboratories, as they offer a wide range of services, such as routine blood tests and diagnostic procedures, is contributing to the market growth.

## Implementation of regulatory mandates and animal health monitoring

The implementation of stringent regulatory mandates and animal health monitoring programs by governments and regulatory bodies across the globe to ensure animal health and safety is positively impacting the market growth. In line with this, the introduction of regulations requiring regular health monitoring and diagnostic testing of livestock and other animals in food production is propelling the market growth. Along with this, the rising adoption of veterinary reference laboratories for providing accurate and reliable testing services is supporting the market growth. Additionally, the burgeoning focus on food safety and quality, prompting the need for regular health monitoring of food-producing animals, is stimulating the market growth. In addition to this, the implementation of animal health monitoring programs aimed at preventing and controlling animal diseases is driving the market growth.

## Expansion of veterinary healthcare facilities and services

The expansion of veterinary healthcare facilities across the globe, prompting the need for specialized diagnostic services offered by veterinary reference laboratories, is acting as a growth-inducing factor. Along with this, the widespread service expansion in rural regions due to the rising demand for veterinary services for the livestock population is providing a considerable boost to the market growth. In addition to this, the growing establishment of veterinary clinics and hospitals equipped with advanced diagnostic tools, fostering the reliance on reference laboratories for specialized tests and analyses, is providing an impetus to the market growth. Apart from this, the rising number of veterinary professionals and the continuous advancements in veterinary medicine, contributing to the burgeoning demand for veterinary reference laboratories, are stimulating the market growth.

## Veterinary Reference Laboratory 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 technology, application, and animal type.

## Breakup by Technology:

Clinical Chemistry

Hematology

Immunodiagnosics

ELISA

Lateral Flow Rapid Tests

Others

Molecular Diagnostics

PCR

Microassays

Others

Others

Clinical chemistry 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 clinical chemistry, hematology, immunodiagnostics (ELISA, lateral flow rapid tests, and others), molecular diagnostics (PCR, microassays, and others), and others. According to the report, clinical chemistry represented the largest segment.

Clinical chemistry represents the largest share of the market, as it encompasses a wide array of tests for assessing organ function, metabolic state, and electrolyte balance, making it crucial for routine health check-ups and disease diagnosis. Moreover, the extensive application of clinical chemistry in diagnosing various conditions, including liver and kidney diseases, diabetes, and hormonal imbalances, is providing a thrust to the market growth. Additionally, the development of automated analyzers and reagents to enhance the efficiency and accuracy of clinical chemistry tests is boosting the market growth.

Hematology emphasizes the analysis of blood components, which include platelets, red blood cells (RBCs), and white blood cells (WBCs). It aids in diagnosing a wide range of blood disorders, including anemia, infections, and clotting problems. Hematology tests are essential for routine health screenings and are increasingly used in veterinary clinics for immediate diagnosis, aiding in timely treatment decisions for various blood-related conditions in animals.

Immunodiagnostics helps in detecting specific antigens or antibodies and provides valuable insights into the immune status of animals. It includes tests, such as enzyme-linked immunosorbent assays (ELISA) and rapid immunoassay for diagnosing infectious diseases, allergies, and immune disorders. Moreover, the growing prevalence of infectious diseases in animals and the need for efficient disease management strategies are favoring the market growth.

Molecular diagnostics is characterized by its precision and accuracy in detecting the

genetic material of pathogens. It includes sophisticated techniques like polymerase chain reaction (PCR) and next-generation sequencing (NGS) for identifying genetic diseases, mutations, and infectious agents at a molecular level. Additionally, the rising adoption of molecular diagnostics due to its ability to provide rapid and definitive results, especially in the identification of novel pathogens and drug-resistant strains, is boosting the market growth.

Breakup by Application:

Clinical Pathology

Toxicology

Productivity Testing

Others

Clinical pathology holds the largest share in the industry

A detailed breakup and analysis of the market based on the application have also been provided in the report. This includes clinical pathology, toxicology, productivity testing, and others. According to the report, clinical pathology accounted for the largest market share.

Clinical pathology dominates the market, as it helps in the diagnosis and management of animal diseases. It encompasses a broad spectrum of tests, including blood tests, urinalysis, histopathology, and cytology, essential for diagnosing a wide range of conditions like infections and cancer. Moreover, the rising prominence of clinical pathology due to its comprehensive approach to evaluating animal health, offering vital insights into the physiological and pathological states of different organ systems, is creating a positive outlook for the market growth. Additionally, rapid advancements in diagnostic techniques and the growing demand for accurate, timely diagnosis in veterinary medicine are boosting the market growth.

Toxicology focuses on detecting and analyzing toxic substances and their effects on animals. It is crucial to identify exposure to toxins, including pesticides, heavy metals, and other environmental contaminants that can adversely affect animal health. Toxicology testing is also essential for monitoring and preventing exposure to harmful

substances in domestic and wild animals.

Productivity testing includes various tests aimed at evaluating the health and productivity of livestock animals for efficient farm management. They assess reproductive health, milk quality, and nutritional status, directly impacting the profitability of livestock businesses. Moreover, the increasing demand for productivity testing, fueled by the growing need for sustainable and efficient livestock production, is enhancing the market growth.

Breakup by Animal Type:

Livestock Animals

Companion Animals

Livestock animals represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the animal type. This includes livestock animals and companion animals. According to the report, livestock animals represented the largest segment.

Livestock animals dominate the market, as veterinary reference laboratories include diagnostic services for a variety of animals, including cattle, swine, poultry, sheep, and goats, which are essential for the production of meat, milk, and eggs. Moreover, the growing need for maintaining the health and productivity of livestock, which directly impacts food security and economic stability is boosting the market growth. In addition to this, the increasing adoption of regular health monitoring, disease testing, and genetic screening in livestock for early disease detection, effective treatment, and prevention of outbreaks, thereby ensuring the safety and quality of animal-derived products, is catalyzing the market growth.

The increasing utilization of veterinary reference laboratories for companion animals due to the increasing pet ownership and the humanization of pets is favoring the market growth. It includes diagnostic services for pets, such as dogs, cats, and horses. Moreover, the rising pet healthcare expenditure and the growing awareness among pet owners about preventive healthcare are contributing to the market growth.

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 veterinary reference laboratory 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 leads the veterinary reference laboratory market due to its advanced veterinary healthcare infrastructure, high pet ownership rates, and implementation of stringent animal health regulations. Moreover, the growing emphasis on pet health and wellness, coupled with substantial spending on animal healthcare, is boosting the market growth. In addition to this, the presence of major veterinary reference laboratories, along with the adoption of cutting-edge diagnostic technologies, is fueling the market growth. Additionally, the heightened focus on livestock health for food safety and quality, propelling the demand for various veterinary diagnostic services in North America, is fostering the market growth.

Europe holds a significant share of the veterinary reference laboratory market, driven by its well-established animal healthcare system and high standards for animal welfare. Moreover, the presence of several leading veterinary diagnostic companies and research institutions, which contribute to the development and adoption of advanced diagnostic techniques, is enhancing the market growth.

The Asia Pacific region is a rapidly emerging segment in the veterinary reference laboratory market, attributed to the increasing awareness about animal health, rising pet ownership, and growing livestock sector in several countries. Moreover, the

development of veterinary healthcare infrastructure and services, along with increased government initiatives for animal health and welfare, is expanding the market growth.

Latin America's veterinary reference laboratory market is growing, driven by the increasing focus on livestock health and productivity. Moreover, the region's popularity as a large livestock population and the increasing investment in veterinary healthcare to improve the quality and safety of their animal-derived products are major factors fueling the market growth.

The veterinary reference laboratory market in the Middle East and Africa is growing due to the heightened demand for improved livestock management and pet care. Moreover, the region's focus on enhancing its veterinary healthcare infrastructure to address challenges, such as infectious diseases, and to ensure food security through healthy livestock is providing a thrust to the market growth.

**Leading Key Players in the Veterinary Reference Laboratory Industry:**

The major players in the market are engaging in a variety of strategic activities to strengthen their position and expand their market share. They are heavily investing in research and development (R&D) to introduce innovative diagnostic tests and technologies that offer more accurate, faster, and comprehensive results. Moreover, some players are focusing on the development of molecular diagnostics and point-of-care (POC) testing devices, which are revolutionizing veterinary diagnostics by providing precise results in a shorter time frame. Besides this, they are actively pursuing mergers, acquisitions, and partnerships with other companies and research institutions to broaden their service offerings and reach.

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:

Boehringer Ingelheim GmbH

IDEXX Laboratories Inc.

Neogen Corporation

Phoenix Central Laboratory for Veterinarians Inc. (Zoetis Inc.)

ProtaTek International Inc. (Pharmgate LLC)

Royal GD

Texas A&M Veterinary Medical Diagnostic Laboratory

VCA Inc. (Mars Incorporated)

Virbac Animal Health India Private Limited

(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 June 2022, IDEXX Laboratories Inc. announced the launch of its new reference laboratory tests and services that will help veterinarians gain insights during wellness screenings, develop treatment plans for cats with chronic kidney disease, and access fast, definitive answers for the most critical cases.

In December 2021, Neogen Corporation acquired Genetics Veterinary Sciences, Inc. (US) to increase the genetic testing portfolio for companion animals.

In November 2023, Boehringer Ingelheim received marketing authorization from the European Commission for SENVELGO, the first once-daily liquid oral solution for the reduction of hyperglycemia in cats with non-insulin-dependent diabetes mellitus.

#### Key Questions Answered in This Report:

How has the global veterinary reference laboratory market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global veterinary reference laboratory market?

What is the impact of each driver, restraint, and opportunity on the global

veterinary reference laboratory market?

What are the key regional markets?

Which countries represent the most attractive veterinary reference laboratory market?

What is the breakup of the market based on technology?

Which is the most attractive technology in the veterinary reference laboratory market?

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

Which is the most attractive application in the veterinary reference laboratory market?

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

Which is the most attractive animal type in the veterinary reference laboratory market?

What is the competitive structure of the market?

Who are the key players/companies in the global veterinary reference laboratory market?

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