

The World Market for Veterinary Diagnostics

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Abstracts

Veterinary diagnostics have incorporated technologies and methods gained from human diagnostics and mainstream healthcare to develop a now full-fledged sister market that remains open to further innovation. Major diagnostic methods in mainstream healthcare – immunodiagnostics, molecular testing (including nucleic acid testing), hematology and clinical chemistry – now have standard applications in the veterinary care of companion (pets) and food animals (livestock and production animals).

This report, *The World Market for Veterinary Diagnostics*, looks at these trends and details:

Markets for Consumer Animal Diagnostics (includes Companion Animal Diagnostics Market Share by Product Category – Analyzers (Clinical, Hematology, Electrolyte), Immunoassay, Molecular)

Markets for Food Animal Diagnostics (includes Immunodiagnostics, Molecular Diagnostics, and Analyzers)

Trends in Pet Ownership and Spending

Trends in Animal Testing

Market Share of Competitors

Market for Testing by Disease (Transmissible Spongiform Encephalopathy, BVD, Ruminant Brucellosis, Avian Influenza, Classical Swine Fever, Pseudorabies / Aujeszky's, Other Diseases)

Important Conclusions About the Market

Regional Breakouts of Food and Companion Markets (US, EU, ROW)

Common diagnostics products for companion animals include analyzer instruments used at clinics, immunodiagnostic assays based on lateral flow design, and more sophisticated laboratory immunoassays completed on plates with microwells and slides. Molecular diagnostics represents a growing, though minor segment of the market with the laboratory utilization of polymerase chain reaction (PCR) and microarray tests. Market development for companion animal diagnostics has depended heavily upon the purchasing and usage of in-clinic analyzers or diagnostic instruments used at veterinary practices. While outside veterinary reference laboratories continue to play a major role in companion animal diagnostics, in-clinic diagnostics is the key feature of the contemporary market.

Food animal diagnostics assist livestock and production animal preventive care and complement other measures such as vaccination and selective breeding. Immunodiagnostic and molecular diagnostic products are used to monitor, manage and eradicate infectious diseases found in prevalent, highly dense food animal populations. The food animal diagnostics market is closely aligned with governmental efforts to protect domestic industries and human populaces from the ravages of outbreaks that include not only heavy economic losses and hunger, but also the transmission of disease into human populations.

Contents

CHAPTER ONE: EXECUTIVE SUMMARY

Introduction to Companion and Food Animal Diagnostics
Veterinary Diagnostic Technologies and Products
Major Veterinary Diseases
Market Performance and Development
Market Factors
Major Findings

CHAPTER TWO: VETERINARY DIAGNOSTIC PRODUCTS

Background
Diagnostic Methods
Immunodiagnosics
ELISA/cELISA
Lateral Flow Tests

IFA/IFAT

Complement Fixation
Agglutination
Tuberculosis Testing
Western Blot
Molecular Tests
PCR/qPCR
Microarrays/Biochips
Blots
Clinical Chemistry
Hematology
Major Veterinary Diseases
Leading Licensed Tests
Conclusion

CHAPTER THREE: COMPANION ANIMAL DIAGNOSTICS MARKET

Background
Market Size, Growth and Segmentation

Regional Markets
Market Factors
Veterinary Visits and Laboratory Requisitions
Consumer Care of Companion Animals
Long-Term Trends in Companion Animal Healthcare
End User Markets
Regulation
Conclusions

CHAPTER FOUR: FOOD ANIMAL DIAGNOSTICS MARKET

Background
Market Size, Growth and Segmentation
Segments
Regional Markets
Market Factors
Transmissible Spongiform Encephalopathy (TSE) Testing Worldwide
Food Animal Diagnostics in an Age of Globalization
End User Markets
Regulation
Conclusions

CHAPTER FIVE: INDUSTRY AND COMPETITION

Background
Competitive Market Shares
New Entrants
Pharmaceuticals
Medical Diagnostics
Biotechnology
Conclusion

CHAPTER SIX: COMPANY PROFILES

Abaxis Corporation
Heska Corporation
IDEXX Laboratories Inc.
Life Technologies Corporation
Pfizer Animal Health

Prionics AG
Other Market Participants

List Of Exhibits

LIST OF EXHIBITS

CHAPTER ONE: EXECUTIVE SUMMARY

Figure 1-1: Major Disease Market Shares in Food Animal Diagnostics (%) (2012)

Figure 1-2: Veterinary Diagnostics Market (\$ millions) (2008-2017)

Figure 1-3: Veterinary Diagnostics Market Share by Product Category – Immunodiagnostics, Molecular Diagnostics, and Analyzers (%) (2012)

Figure 1-4: Veterinary Diagnostics Market Share by Region – United States, Europe, Rest of the World (ROW) (%) (2012)

Table 1-1: Level of Pet Owner Agreement with Statement: “I am spending less on pet products because of the economy,” February 2010 vs. May/June 2011 (%)

Figure 1-5: Japanese Beef Imports (thousands of kilograms) by Origin (2002-2011)

Figure 1-6: Japanese Poultry Imports (thousands of kilograms) by Origin (2002-2011)

Figure 1-7: European Commission Reimbursements Allotments for Animal Disease Monitoring and Eradication Programs by Disease (Thousands of Euros) (2006-2012)

CHAPTER TWO: VETERINARY DIAGNOSTIC PRODUCTS

Table 2-1: Common Parasite Immunoassay Tests – Disease/Test Type/Manufacturer

Table 2-2: Common Companion Animal Bacterial and Viral Immunoassay Tests – Disease/Test Type/Manufacturer

Table 2-3: Common Food Animal Bacterial, Viral and Prionic Immunoassay Tests – Disease/Test Type/Manufacturer

Table 2-4: Other Non-Infectious Disease and Health Condition Tests – Disease/Test Type/Manufacturer

Table 2-5: Veterinary Molecular Diagnostic Test Kits – Disease/Test Type/Manufacturer

CHAPTER THREE: COMPANION ANIMAL DIAGNOSTICS MARKET

Figure 3-1: Companion Animal Diagnostics Market Share by Product Category – Analyzers (Clinical, Hematology, Electrolyte), Immunoassay, Molecular (%) (2012)

Figure 3-2: Companion Animal Diagnostics Market Share by Region – United States, Europe, Rest of the World (ROW) (%) (2012)

Figure 3-3: Companion Animal Diagnostics Market (\$ millions) (2008-2017)

Figure 3-4: Veterinary Lab Testing Market Growth Trends (2007-2012) (%)

Table 3-1: Level of Pet Owner Agreement with Statement: “I am spending less on pet

products because of the economy,” February 2010 vs. May/June 2011 (%)

Table 3-2: \$70k+ Household Share of U.S. Pet Market Expenditures: By Category (1999-2010)

Figure 3-5: North American Pet Insurance Market Revenues: United States and Canada (\$ millions) (2005/2009/2014)

Figure 3-6: Percentage of Dog and Cat Owners by Age of Oldest Pet (2011)

Figure 3-7: Companion Animal Diagnostics End User Market Shares – POC, Laboratory and Consumer (%) (2012)

CHAPTER FOUR: FOOD ANIMAL DIAGNOSTICS

Figure 4-1: Food Animal Diagnostics Market Share by Product Category – Immunodiagnostics, Molecular Diagnostics, and Analyzers (%) (2012)

Figure 4-2: Food Animal Diagnostics Market Share by Region – United States, Europe, Rest of the World (ROW) (%) (2012)

Figure 4-3: Food Animal Diagnostics Market (\$ millions) (2008-2017)

Table 4-1: Global TSE Diagnostic Testing Volume by Country/Region (United States, Canada, Japan, Europe) and Type (BSE, Scrapie, CWD) (2006-2012)

Figure 4-4: Major Disease Market Shares in Food Animal Diagnostics (%) (2012)

Figure 4-5: Japanese Beef Consumption (kilograms per person) (1990-2008)

Figure 4-6: Japanese Beef Imports (thousands of kilograms) by Origin (2002-2011)

Figure 4-7: Japanese Poultry Imports (thousands of kilograms) by Origin (2002-2011)

CHAPTER FIVE: INDUSTRY AND COMPETITION

Figure 5-1: Veterinary Diagnostics Market by Competitive Share (2012) (%)

Table 5-1: Mergers & Significant Acquisitions – Veterinary Diagnostics/Animal Health & Pharmaceuticals

Table 5-2: Mergers & Significant Acquisitions – Veterinary Diagnostics & Medical Diagnostics

Table 5-3: Mergers & Significant Acquisitions – Veterinary Diagnostics & Biotechnology

CHAPTER SIX: COMPANY PROFILES

Table 6-1: Abaxis Product List (Veterinary Diagnostics and Other)

Figure 6-1: Abaxis Revenues by Product Group/Segment (2011 – Fiscal Q4 2011 through Q3 2012)

Table 6-2: Heska Product List (Veterinary Diagnostics and Other)

Figure 6-2: Heska Revenues by Product Group/Segment (2011)

Table 6-3: IDEXX Acquisitions (2003-2012)

Table 6-4: IDEXX Product List (Veterinary Diagnostics and Other)

Figure 6-3: IDEXX Revenues by Product Group/Segment (2011)

Table 6-5: Applied Biosystems Product List (Veterinary Diagnostics/Animal Health)

Table 6-6: Synbiotics Product List (Veterinary Diagnostics and Other)

Table 6-7: Prionics Product List (Veterinary Diagnostics and Other)

Table 6-8: Other Veterinary Diagnostics Suppliers

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