

Companion Animal Diagnostics Market Forecasts to 2034 – Global Analysis By Animal Type (Dogs, Cats, Horses, Birds, Rabbits, and Other Companion Animals), Product, Technology, Indication, Sample Type, Testing Location, End User, Application, Distribution Channel, and By Geography

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Abstracts

According to Statistics MRC, the Global Companion Animal Diagnostics Market is accounted for \$3.0 billion in 2026 and is expected to reach \$6.4 billion by 2034 growing at a CAGR of 9.9% during the forecast period. Companion animal diagnostics encompasses products and services used for the detection, diagnosis, and monitoring of diseases and health conditions in companion animals including dogs, cats, horses, birds, rabbits, and other companion animals. The market includes diagnostic instruments such as hematology analyzers, clinical chemistry analyzers, immunodiagnostic analyzers, molecular diagnostic instruments, urinalysis analyzers, blood gas and electrolyte analyzers, coagulation analyzers, and microbiology systems, along with consumables, reagents, kits, and software and diagnostic services. Growing pet ownership, increasing demand for advanced veterinary care, rising prevalence of chronic diseases in companion animals, and technological advancements in diagnostic technologies are key drivers of market expansion across all regions.

Market Dynamics:

Driver:

Increasing pet ownership and demand for advanced veterinary care

The rising global pet population and growing demand for sophisticated veterinary medical care are primary drivers for the companion animal diagnostics market. Pet owners increasingly consider their animals as family members and are willing to invest in advanced diagnostic procedures comparable to human healthcare. The humanization of pets has led to greater expectations for accurate diagnosis, disease monitoring, and preventive care. As veterinary practices expand services and specialty care becomes more accessible, diagnostic testing utilization increases. Growing awareness of the benefits of early disease detection through diagnostic testing further supports market growth. These trends across developed and emerging markets sustain strong demand for companion animal diagnostic solutions.

Restraint:

High costs of diagnostic instruments and limited practice budgets

The significant capital investment required for diagnostic instruments and limited veterinary practice budgets represent a major restraint for the market. Advanced diagnostic instruments including hematology analyzers, molecular diagnostic systems, and immunodiagnostic platforms require substantial upfront investment. Smaller veterinary practices may lack sufficient capital for equipment acquisition. Ongoing consumables, reagents, maintenance, and service costs add to ownership expenses. Reimbursement limitations for veterinary diagnostics in many regions affect practice economics. These cost barriers may limit equipment adoption, particularly among smaller practices and in developing regions with constrained veterinary budgets.

Opportunity:

Technological advancements in point-of-care diagnostics

Continuous innovation in point-of-care diagnostic technologies presents significant opportunities for companion animal diagnostics market expansion. Portable and handheld diagnostic devices enable rapid, on-site testing, improving clinical decision-making and patient outcomes. Advances in molecular diagnostics including PCR and isothermal amplification enable infectious disease detection at the point of care. Immunoassay technologies are becoming more accessible for in-clinic use. Digital diagnostic platforms with connectivity features enable remote consultation and data sharing. As point-of-care technologies become more affordable and accessible, diagnostic testing expands to more practices, capturing growing market share and improving patient care.

Threat:

Shortage of veterinary specialists and training requirements

The limited availability of veterinary specialists and the training requirements for diagnostic equipment operation pose significant threats to the market. Proper operation and interpretation of advanced diagnostic instruments require specialized training that may not be available in all practices. Staff training for instrument operation, maintenance, and quality control adds to operational costs. Veterinary practices may struggle to recruit qualified personnel to operate and interpret diagnostic systems. The shortage of specialists limits access to advanced diagnostic testing, particularly in underserved areas. These workforce challenges may slow equipment adoption and testing utilization, especially for advanced diagnostic modalities.

Covid-19 Impact:

The COVID-19 pandemic had a significant impact on the companion animal diagnostics market. Initial disruptions included reduced veterinary visits during lockdowns, supply chain interruptions, and practice closures. However, pet adoption surged during the pandemic, expanding the pet population and creating new patients. Telemedicine and remote consultation expanded, increasing demand for diagnostic data sharing. Veterinary practices adapted with enhanced infection control and contactless workflows. The pandemic heightened focus on preventive healthcare and early disease detection. Post-pandemic, elevated pet ownership and continued focus on pet health have sustained demand for diagnostic testing, with practices continuing investment in diagnostic capabilities.

The Dogs segment is expected to be the largest during the forecast period

The Dogs segment is expected to account for the largest market share during the forecast period, driven by the large and growing dog population, high veterinary visit frequency, and extensive diagnostic testing utilization. Dogs are the most common companion animals globally, with ownership rates exceeding other pet types across most regions. Dog owners demonstrate high spending on veterinary care and preventive health services. The segment benefits from extensive diagnostic protocols and established testing panels across disease categories. Growing awareness of canine health issues, expanding preventive care adoption, and increasing chronic disease prevalence drive testing demand. With the largest patient population and

highest testing utilization, dogs maintain the largest market share.

The Molecular Diagnostic Instruments segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Molecular Diagnostic Instruments segment is predicted to witness the highest growth rate, fueled by increasing adoption of PCR and other molecular testing in veterinary practice, growing demand for infectious disease detection, and technological advancements making molecular diagnostics more accessible. Molecular diagnostic instruments enable detection of pathogens at the genetic level, providing high sensitivity and specificity for infectious disease diagnosis. The segment benefits from the expansion of veterinary infectious disease testing, including respiratory, gastrointestinal, and vector-borne diseases. Point-of-care molecular systems are increasing accessibility. As molecular testing becomes more routine in veterinary practice, this segment delivers the fastest market growth.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by high pet ownership rates, strong spending on veterinary care, and advanced veterinary healthcare infrastructure. The United States leads regional market growth with substantial investment in veterinary practices and diagnostic capabilities. High awareness of advanced diagnostic options among pet owners supports testing demand. Established veterinary specialist networks and referral practices create consistent diagnostic volumes. Strong presence of diagnostic equipment manufacturers and technology innovation drives adoption. With high pet spending and advanced veterinary infrastructure, North America maintains its dominant market position.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by rising pet ownership, increasing disposable incomes, and growing awareness of advanced veterinary diagnostics across countries including China, India, Australia, and Southeast Asia. The region's rapidly growing pet population and expanding middle class create substantial demand for veterinary diagnostic services. Veterinary practice modernization and technology adoption are accelerating. Increasing investment in veterinary education and specialist training is expanding the talent pool. Growing awareness of diagnostic benefits and increasing insurance coverage support

market expansion. As veterinary healthcare develops, Asia Pacific delivers the fastest companion animal diagnostics market growth globally.

Key players in the market

Some of the key players in Companion Animal Diagnostics Market include IDEXX Laboratories, Inc., Zoetis Inc., Heska Corporation, Virbac S.A., Thermo Fisher Scientific Inc., Agrolabo S.p.A., INDICAL BIOSCIENCE GmbH, FUJIFILM Corporation, bioMérieux SA, Randox Laboratories Ltd., Neogen Corporation, BioNote Inc., Shenzhen Mindray Bio-Medical Electronics Co., Ltd., Eurofins Scientific SE, Antech Diagnostics (Mars Inc.), Esaote S.p.A., Scil Animal Care Company GmbH, and Carestream Health Inc.

Key Developments:

In April 2026, Zoetis expanded the diagnostic capabilities of its AI-powered point-of-care hematology analyzer, Vetscan OptiCell™, introducing Cellular Hemoglobin Concentration Mean (CHCM) and plateletcrit (PCT) parameters directly to in-clinic workflows.

In March 2026, Neogen announced the strategic divestiture of its global Animal Genomics business unit to Zoetis, redirecting its operational focus toward core food safety, environmental monitoring, and diagnostic test kits.

In January 2026, Antech announced the commercial launch of RapidRead™ Dental for Feline—an AI-powered radiology interpretation tool designed specifically for feline tooth resorption—and added in-house quantitative SDMA kidney function testing to its Element i+ diagnostic platform.

Animal Types Covered:

Dogs

Cats

Horses

Birds

Rabbits

Other Companion Animals

Products Covered:

Instruments

Consumables, Reagents and Kits

Software and Diagnostic Services

Technologies Covered:

Clinical Biochemistry

Immunodiagnosics

Molecular Diagnostics

Hematology

Urinalysis

Microbiology

Cytology and Histopathology

Clinical Pathology

Other Technologies

Indications Covered:

Infectious Diseases

Endocrine Disorders

Cardiovascular Disorders

Gastrointestinal Disorders

Renal Disorders

Hepatic Disorders

Cancer and Oncology

Metabolic Disorders

Genetic Disorders

Allergies and Autoimmune Diseases

Other Indications

Sample Types Covered:

Blood

Urine

Fecal Samples

Tissue Samples

Saliva

Swab Samples

Serum and Plasma

Other Sample Types

Testing Locations Covered:

- Point-of-Care Testing
- Reference Laboratories
- In-House Veterinary Laboratories
- Academic and Research Laboratories

End Users Covered:

- Veterinary Hospitals and Clinics
- Veterinary Diagnostic Laboratories
- Academic and Research Institutes
- Animal Shelters and Rescue Centers
- Home Care Settings
- Other End Users

Applications Covered:

- Routine Health Screening
- Disease Diagnosis
- Disease Monitoring
- Preventive Healthcare Screening
- Pre-Surgical Assessment
- Wellness Programs

Other Applications

Distribution Channels Covered:

Direct Sales

Veterinary Distributors

Online Sales

Retail Pharmacies

Other Distribution Channels

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Companion Animal Diagnostics Market Forecasts to 2034 – Global Analysis By Animal Type (Dogs, Cats, Horses, Bi...

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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