

Pet Allergy Diagnostics Market Forecasts to 2034 – Global Analysis By Test Type (Serum IgE Testing, Intradermal Skin Testing, Saliva-Based Tests, Hair/Fur-Based Tests, Blood-Based Tests, Molecular Diagnostics and Component-Resolved Diagnostics), Allergen Type, Animal Type, End User and By Geography

<https://marketpublishers.com/r/P82442E7313EEN.html>

Date: July 2026

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: P82442E7313EEN

Abstracts

According to Statistics MRC, the Global Pet Allergy Diagnostics Market is accounted for \$0.6 billion in 2026 and is expected to reach \$1.3 billion by 2034 growing at a CAGR of 10.1% during the forecast period. Pet allergy diagnostics refers to laboratory and point-of-care testing methodologies used to identify, classify, and quantify allergen sensitivities in companion animals. These tests include serum IgE assays, intradermal skin testing, saliva-based panels, molecular diagnostics, and component-resolved diagnostic platforms that map specific allergen protein binding profiles. Analysis encompasses environmental, food, flea-related, contact, and insect allergen categories across canine, feline, equine, and exotic species. Results guide veterinary immunotherapy formulation and long-term allergen avoidance management protocols.

Market Dynamics:

Driver:

Rising pet allergy prevalence

The increasing prevalence of allergic and atopic dermatitis conditions in companion animals is generating consistent diagnostic testing demand across veterinary practices

globally. Environmental allergen exposure, dietary changes, and selective breeding practices have contributed to elevated hypersensitivity rates, particularly in dogs and cats. Veterinary dermatology is among the fastest-growing specialty segments, with allergy diagnostics representing a primary revenue source. Owner awareness campaigns by pharmaceutical manufacturers and professional veterinary associations are expanding routine diagnostic uptake beyond specialist referral cases.

Restraint:

High diagnostic test costs

Comprehensive allergen panel testing represents a significant cost barrier for price-sensitive pet owners, particularly in markets with limited veterinary insurance penetration. Serum IgE testing and component-resolved diagnostic platforms command premium laboratory fees that many owners decline in favor of empirical elimination diets. Intradermal testing requires specialist dermatology referral with associated consultation surcharges. The perceived low urgency of non-life-threatening allergic conditions reduces owner prioritization of formal diagnostic investment. These cost factors suppress testing frequency below medically indicated levels in many geographic markets.

Opportunity:

Point-of-care test development

The development of rapid, affordable point-of-care allergy diagnostic devices represents a transformative commercialization opportunity for the pet allergy diagnostics segment. Lateral flow assay platforms and microfluidic chip technologies are enabling in-clinic testing with same-day results, eliminating laboratory turnaround delays. Compact analyzers compatible with general practice settings reduce specialist referral dependency. Lower per-test manufacturing costs for rapid diagnostic formats expand accessible price points. First-mover advantages in POCT pet allergy diagnostics are attracting significant venture capital investment.

Threat:

Empirical treatment preference

A substantial proportion of veterinary practitioners continue to prescribe empirical

hypoallergenic dietary trials and anti-inflammatory therapies before initiating formal allergen diagnostic workups. This treatment-first approach limits referral volumes to diagnostic laboratories and specialty testing services. Broad-spectrum pharmaceutical treatments with proven efficacy reduce clinical urgency for identifying specific allergen profiles. Owner preference for immediate symptom relief over diagnostic clarity further suppresses testing demand. Generic immunosuppressant approval has reduced cost barriers for symptomatic management, directly competing with diagnostic investment.

Covid-19 Impact:

The COVID-19 pandemic disrupted routine veterinary visits, delaying non-urgent allergy diagnostic workups across major markets. Laboratory supply chains for specialized allergen reagents experienced significant disruptions. However, pandemic-era pet adoption surges created long-term expansion in the diagnosed animal population base. Telehealth consultations enabled remote symptom assessment, generating increased demand for home-compatible diagnostic sample collection kits. Post-pandemic, the backlog of deferred dermatology consultations accelerated diagnostic volume recovery.

The serum IgE testing segment is expected to be the largest during the forecast period

The serum IgE testing segment is expected to account for the largest market share during the forecast period, due to its established clinical utility, non-invasive sample collection requirements, and wide availability through reference laboratory networks globally. Blood-based IgE panel testing does not require sedation or specialist facilities, enabling general practice veterinarians to order without referral. Major diagnostic laboratory providers, including IDEXX Laboratories Inc. and Zoetis Inc., offer comprehensive multi-allergen serum panels with standardized reporting formats. Reimbursement acceptance by pet insurance carriers further supports utilization.

The food allergens segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the food allergens segment is predicted to witness the highest growth rate, driven by the increasing recognition of food-induced allergic reactions in companion animals. Rising pet ownership, coupled with greater awareness among pet owners regarding dietary sensitivities, is accelerating demand for accurate diagnostic solutions. Veterinarians are increasingly recommending allergen-specific testing to identify adverse food reactions and improve treatment outcomes. Furthermore, the growing availability of advanced diagnostic assays and personalized pet nutrition

programs is supporting segment expansion. As pet health monitoring becomes more proactive, the adoption of food allergy diagnostics is expected to strengthen significantly.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, due to the high density of veterinary dermatology specialists, advanced laboratory infrastructure, and well-established pet insurance reimbursement frameworks for diagnostic testing. The United States hosts leading diagnostic companies, including IDEXX Laboratories Inc., Heska Corporation, and Neogen Corporation. Strong regulatory oversight ensures high diagnostic quality standards. Consumer willingness to invest in comprehensive pet healthcare is among the highest globally, supporting premium test adoption.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, due to rapidly expanding veterinary infrastructure in China, Japan, South Korea, and Australia, and rising awareness of atopic disease in companion animals. Domestic veterinary diagnostic companies are partnering with global allergen manufacturers to distribute testing panels in previously underpenetrated markets. Increasing pet insurance adoption in Japan and South Korea is improving reimbursement pathways for diagnostic workups. Government investments in veterinary education are producing a new generation of allergy-aware practitioners.

Key players in the market

Some of the key players in Pet Allergy Diagnostics Market include IDEXX Laboratories Inc., Zoetis Inc., Mars Petcare, Boehringer Ingelheim, Elanco Animal Health, Neogen Corporation, Heska Corporation, Greer Laboratories, Stallergenes Greer, Thermo Fisher Scientific Inc., bioMérieux SA, Virbac SA, Vetoquinol SA, Dechra Pharmaceuticals Plc, Nextmune, ALK-Abellø, and Leti Pharma.

Key Developments:

In May 2026, IDEXX Laboratories Inc. launched an expanded canine and feline environmental allergen panel incorporating 120 region-specific allergen components, available through its global reference laboratory network with 48-hour turnaround

reporting.

In April 2026, Zoetis Inc. received regulatory clearance for a point-of-care rapid IgE screening device designed for in-clinic use in veterinary general practices, enabling preliminary allergy screening without reference laboratory submission.

In March 2026, Nextmune expanded its allergen immunotherapy manufacturing capacity in Europe with a new GMP-certified production facility, increasing customized sublingual and subcutaneous allergy treatment formulation throughput by 40 percent.

Test Types Covered:

Serum IgE Testing

Intradermal Skin Testing

Saliva-Based Tests

Hair/Fur-Based Tests

Blood-Based Tests

Molecular Diagnostics

Component-Resolved Diagnostics

Allergen Types Covered:

Environmental Allergens

Food Allergens

Flea Allergy Dermatitis

Contact Allergens

Insect Allergens

Animal Types Covered:

Dogs

Cats

Horses

Small Mammals

Exotic Pets

End Users Covered:

Veterinary Hospitals

Veterinary Clinics

Diagnostic Laboratories

Academic and Research Institutes

Home Care Settings

Pet Owners

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

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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