

Veterinary Point-of-Care Diagnostics Market Forecasts to 2034 – Global Analysis By Product (Instruments and Analyzers, Test Kits and Consumables, and Software and Data Management Solutions), Diagnostic Technology, Animal Type, Indication, Sample Type, End User, Application, Distribution Channel, and By Geography

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Abstracts

According to Statistics MRC, the Global Veterinary Point-of-Care Diagnostics Market is accounted for \$2.9 billion in 2026 and is expected to reach \$6.7 billion by 2034 growing at a CAGR of 10.9% during the forecast period. Veterinary point-of-care diagnostics refer to diagnostic tests and systems performed at or near the site of patient care, enabling rapid, real-time clinical decision-making for animal health. The market encompasses instruments and analyzers including benchtop and portable/handheld analyzers, test kits and consumables such as reagent kits, test strips, cartridges and cassettes, and controls and calibrators, along with software and data management solutions. Diagnostic technologies include immunodiagnostics, molecular diagnostics, clinical biochemistry, hematology, blood gas and electrolyte analysis, urinalysis, coagulation testing, microbiology testing, and other diagnostic technologies. Growing pet ownership, increasing demand for rapid diagnostic results, rising prevalence of chronic and infectious diseases in animals, and technological advancements in diagnostic platforms are key drivers of market expansion across all regions.

Market Dynamics:

Driver:

Growing demand for rapid and accurate diagnostic results

The increasing need for timely and accurate diagnostic information to enable prompt clinical decision-making is a primary driver for the veterinary point-of-care diagnostics market. Veterinarians require rapid test results to initiate appropriate treatment, particularly in emergency and critical care situations where time is critical. Point-of-care diagnostics eliminate the delays associated with sending samples to reference laboratories, enabling immediate clinical action. The growing complexity of veterinary cases and increasing owner expectations for rapid answers drive demand for in-clinic testing. As veterinary medicine advances and treatment options expand, the need for rapid diagnostic support continues growing, sustaining strong market expansion.

Restraint:

High equipment costs and limited practice budgets

The significant capital investment required for point-of-care diagnostic equipment and ongoing consumable costs represent a major restraint for the market. Advanced analyzers and diagnostic platforms require substantial upfront investment that may be challenging for smaller practices. Ongoing consumable costs including reagents, test kits, and calibrators add to operational expenses. Reimbursement limitations for veterinary diagnostics affect practice economics. Limited budgets, particularly in small and rural practices, may restrict equipment acquisition. These cost barriers may limit adoption and market growth, especially in developing regions and among smaller veterinary practices.

Opportunity:

Technological advancements in miniaturization and connectivity

Continuous innovation in diagnostic technologies including miniaturization, connectivity, and user-friendly platforms presents significant opportunities for market expansion. Portable and handheld analyzers enable testing in diverse settings including field practice, large animal medicine, and mobile clinics. Wireless connectivity and cloud-based data management enable seamless integration with practice management software and telemedicine platforms. AI-powered interpretation and decision support tools are enhancing diagnostic accuracy. User-friendly interfaces reduce training requirements. As technology becomes more accessible and affordable, new applications and expanded access capture growing market share, expanding the

addressable market.

Threat:

Competition from reference laboratories and centralized testing

Competition from established reference laboratories and centralized testing services poses significant threats to the veterinary point-of-care diagnostics market. Reference laboratories offer comprehensive test menus, specialized expertise, and economies of scale. Some veterinarians may prefer referral laboratory testing for complex cases or when point-of-care capabilities are limited. The convenience of sample pickup and comprehensive reporting may favor centralized testing. Cost considerations may make reference laboratory testing more economical for certain tests. This competition may limit point-of-care adoption for certain test categories and practices.

Covid-19 Impact:

The COVID-19 pandemic had a significant impact on the veterinary point-of-care diagnostics market. Initial disruptions included reduced veterinary visits during lockdowns and supply chain interruptions. However, pet adoption surged during the pandemic, expanding the patient population. The pandemic accelerated demand for rapid diagnostics and in-clinic testing capabilities. Increased focus on infection control and biosecurity drove interest in point-of-care solutions. Telemedicine expansion increased demand for diagnostic data connectivity. Post-pandemic, elevated pet ownership and continued focus on rapid diagnostics have sustained market growth, with practices maintaining investment in point-of-care capabilities.

The Instruments and Analyzers segment is expected to be the largest during the forecast period

The Instruments and Analyzers segment is expected to account for the largest market share during the forecast period, driven by the essential role of diagnostic platforms in enabling comprehensive point-of-care testing across multiple test categories. Instruments and analyzers including benchtop and portable/handheld systems are the foundation of veterinary point-of-care diagnostics, providing the hardware necessary for conducting tests and generating results. The segment benefits from continuous innovation including miniaturization and connectivity advancements. Ongoing replacement and upgrade cycles sustain demand. As practices invest in diagnostic capabilities, instruments and analyzers remain the largest product segment, securing

the largest market share throughout the forecast period.

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

Over the forecast period, the Molecular Diagnostics segment is predicted to witness the highest growth rate, fueled by increasing demand for rapid, accurate infectious disease detection, growing availability of point-of-care molecular platforms, and technological advancements enabling simpler, faster testing. Molecular diagnostics including PCR-based tests and isothermal amplification tests offer high sensitivity and specificity for detecting pathogens at the genetic level. The segment benefits from expanding applications in infectious disease testing, genetic testing, and antimicrobial resistance detection. Growing availability of user-friendly, rapid molecular platforms suitable for point-of-care use is driving adoption. As molecular testing becomes more accessible and affordable, 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 veterinary spending, and established point-of-care diagnostics adoption. The United States leads regional market growth with extensive veterinary practice infrastructure and high diagnostic testing utilization. High awareness of advanced diagnostic options among pet owners supports demand. Strong presence of diagnostic equipment manufacturers drives innovation. Established veterinary reference networks and specialty practices create consistent demand. With high pet healthcare 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 services. Veterinary practice modernization and technology adoption are accelerating. Increasing investment in veterinary education and diagnostic infrastructure supports market expansion. Growing awareness of point-of-care diagnostics benefits and expanding pet insurance coverage further accelerate adoption. As veterinary healthcare develops and pet

spending increases, Asia Pacific delivers the fastest veterinary point-of-care diagnostics market growth globally.

Key players in the market

Some of the key players in Veterinary Point-of-Care Diagnostics Market include IDEXX Laboratories, Inc., Zoetis Inc., Heska Corporation, Virbac S.A., Thermo Fisher Scientific Inc., FUJIFILM Corporation, Randox Laboratories Ltd., bioMérieux SA, QIAGEN N.V., BioNote, Inc., SEKISUI Diagnostics, LLC, Woodley Equipment Company Ltd., Shenzhen Mindray Bio-Medical Electronics Co., Ltd., INDICAL BIOSCIENCE GmbH, Bionote USA Inc., and Neogen Corporation.

Key Developments:

In May 2026, IDEXX Laboratories expanded its Fecal Dx antigen testing platform by adding Taeniid tapeworm detection capabilities to improve point-of-care parasitic screening for companion animals.

In March 2026, Zoetis entered into a definitive agreement to acquire the global animal genomics business from Neogen Corporation, expanding its precision animal health and predictive diagnostic insights portfolio across livestock and companion animals.

In March 2026, Neogen Corporation announced the divestiture of its global animal genomics business unit to Zoetis, realigning its resources to focus on core food safety, indicator media, and specialized point-of-care sanitation platforms.

In September 2025, FUJIFILM Healthcare Europe launched the FUJI DRI-CHEM AU20V in-house diagnostics measurement device, featuring automated dilution and Surface Plasmon Fluorescence (SPF) technology to deliver point-of-care endocrine and hormone results in 10 minutes.

Products Covered:

Instruments and Analyzers

Test Kits and Consumables

Software and Data Management Solutions

Diagnostic Technologies Covered:

Immunodiagnosics

Molecular Diagnostics

Clinical Biochemistry

Hematology

Blood Gas and Electrolyte Analysis

Urinalysis

Coagulation Testing

Microbiology Testing

Other Diagnostic Technologies

Animal Types Covered:

Companion Animals

Livestock Animals

Indications Covered:

Infectious Diseases

Parasitic Diseases

Endocrine Disorders

Cardiac Disorders

Renal Diseases

Hepatic Diseases

Gastrointestinal Disorders

Respiratory Diseases

Reproductive Health Disorders

Metabolic Disorders

Other Indications

Sample Types Covered:

Blood

Serum and Plasma

Urine

Fecal Samples

Saliva

Tissue Samples

Milk

Other Sample Types

End Users Covered:

Veterinary Hospitals and Clinics

Veterinary Diagnostic Laboratories

Livestock Farms and Dairy Farms

Research Institutes and Universities

Animal Shelters and Rescue Centers

Home Care Settings

Other End Users

Applications Covered:

Disease Diagnosis

Wellness Screening

Pregnancy Testing

Pre-Surgical Testing

Treatment Monitoring

Herd Health Monitoring

Emergency and Critical Care Diagnostics

Other Applications

Distribution Channels Covered:

Direct Sales

Veterinary Distributors

Retail Pharmacies

E-Commerce Platforms

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

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

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