

Companion Animal Diagnostic Services Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Testing (Clinical Chemistry, Microbiology, Parasitology, Histopathology, Cytopathology, Hematology, Immunology & Serology, Imaging, Molecular Diagnostics, Others), By Type (Point-of-Care (POC), Laboratory-based), By Animal Type (Dogs, Cats, Horses, Others), By Region and Competition, 2020-2030F

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Abstracts

Global Companion Animal Diagnostic Services Market was valued at USD 7.68 Billion in 2024 and is anticipated to project impressive growth in the forecast period with a CAGR of 7.28% through 2030. The global companion animal diagnostic services market has seen remarkable growth in recent years, reflecting the increasing importance of pets in our lives. As pet ownership continues to rise worldwide, the demand for high-quality veterinary diagnostic services has never been greater.

The global companion animal diagnostic services market has been on a steady growth trajectory, driven by several key factors. One of the primary drivers is the ever-expanding pet ownership landscape. People are not only welcoming cats and dogs into their homes but are increasingly willing to invest in their health and well-being. This emotional bond between pet owners and their animals has fueled the demand for advanced diagnostic services. Additionally, the rise in pet insurance coverage has made it more affordable for pet owners to seek comprehensive diagnostic services for their furry companions. With the financial burden alleviated, pet owners are more likely to approve and proceed with diagnostic tests and treatments recommended by

veterinarians.

The companion animal diagnostic services market has witnessed significant technological advancements in recent years. These innovations have led to quicker, more accurate diagnoses and treatments, improving the overall healthcare of pets. Advanced diagnostic tools such as digital radiography, ultrasound, and molecular testing have revolutionized the way veterinarians assess and treat animals. Telemedicine has also made its mark in the pet care industry, allowing pet owners to consult with veterinarians remotely, thereby expanding access to diagnostic services and expert advice. This has been particularly valuable in rural and underserved areas.

Key Market Drivers

Rising Pet Ownership

In recent years, there has been a remarkable surge in pet ownership worldwide, and with it, a burgeoning need for high-quality veterinary care. This trend has ignited a significant growth in the global companion animal diagnostic services market. Pet owners are becoming increasingly aware of the importance of regular health check-ups and diagnostics for their furry family members. As a result, the market for companion animal diagnostic services is flourishing. The global increase in pet ownership is a multifaceted phenomenon. While pets have always held a special place in our hearts, several factors have converged to accelerate this trend. The COVID-19 pandemic played a pivotal role in this pet boom. With lockdowns and social distancing measures, people sought companionship and comfort in the form of pets. This surge in adoptions and purchases led to an upswing in pet ownership, with dogs, cats, and even exotic animals finding new homes. According to the 2024 Global Pet Parent Study, the global pet population is estimated to be approximately 1 billion. Cats are more popular among male pet owners, with 52% of men owning cats compared to 48% of women. Notably, 47% of the 56% of respondents who own either a cat or dog are first-time pet owners, indicating a growing trend in new pet adoption. The study also highlighted key barriers to pet ownership. Among non-dog owners, 18% cited unsuitable living conditions, while another 18% pointed to the high maintenance requirements of pets as the primary deterrents. For prospective cat owners, concerns about furniture damage (15%) and allergies (11%) were frequently mentioned as factors preventing ownership. These insights provide valuable data for businesses in the pet care and pet products sectors, underscoring areas for innovation and targeted marketing to address these challenges and capitalize on the growing pet ownership trend.

In parallel with the increase in pet ownership, there has been a notable shift in pet owners' attitudes towards healthcare for their animals. More people now consider their pets as integral members of the family, leading to an increased willingness to invest in their well-being. Consequently, pet owners are more inclined to visit veterinarians and use diagnostic services to ensure their pets' health and longevity. The companion animal diagnostic services industry has not lagged behind in technological advancements. In recent years, there have been notable developments in diagnostic tools and services. This has translated to a broader range of diagnostic tests and treatments for pets. Diagnostic services now include everything from routine blood work to advanced imaging techniques like MRI and CT scans, allowing veterinarians to diagnose and treat a wide range of health issues more effectively. Mumbai is set to introduce India's first pet-dedicated CT and MRI scanners, designed specifically for animals. The Small Animal Hospital by Tata Trusts in Mumbai has successfully tested its first CT scan machine tailored for veterinary use. This state-of-the-art facility, located in Mahalaxmi, will soon be inaugurated as a pioneering institution in pet healthcare. Spanning over 98,000 square feet across five floors, the hospital is equipped with over 200 beds, setting a new standard in animal care and veterinary medicine in India. Just like in human healthcare, prevention is becoming a critical aspect of pet healthcare. Regular check-ups, vaccinations, and preventive treatments are no longer seen as optional. This emphasis on proactive healthcare measures has further boosted the demand for companion animal diagnostic services. Pet owners are increasingly opting for regular screenings and early detection to address health issues before they become severe and costly to treat.

The future of the companion animal diagnostic services market looks promising, driven by ongoing pet ownership growth and evolving pet healthcare needs. The demand for advanced diagnostic tools and services will continue to drive innovation in the pet healthcare industry. We can expect to see new technologies, treatments, and testing methods emerging in response to this growing demand. With more pet owners investing in preventive care and early diagnosis, pets are likely to lead healthier lives and experience improved outcomes. This will strengthen the bond between pet owners and their animals. The expanding market creates opportunities for veterinarians, technicians, and professionals in the pet healthcare sector. It also fosters job growth and specialization in the field. As pet owners increasingly prioritize their pets' health, there will be a surge in awareness regarding pet healthcare and responsible ownership, potentially leading to stricter regulations and better pet welfare standards.

Growing Insurance Coverage for Pets

In recent years, there has been a noticeable and heartwarming shift in how people view and care for their pets. Pet ownership has evolved from being a mere responsibility to a genuine emotional investment. This shift is clearly reflected in the rising popularity of pet insurance, a trend that is significantly impacting the global companion animal diagnostic services market. Pet insurance, once a niche market, has seen remarkable growth over the past decade. As more people consider their pets as integral members of their families, the demand for comprehensive healthcare coverage for these furry, feathered, or scaly companions has surged. Pet insurance policies are designed to help pet owners offset the high costs associated with veterinary care, including diagnostic services, surgeries, medications, and preventive care. The surge in pet insurance coverage is primarily attributed to the growing awareness of the benefits it offers. It not only provides financial support for unexpected veterinary expenses but also encourages pet owners to provide the best possible healthcare for their pets, making early diagnosis and treatment more accessible. This change in perspective is positively influencing the companion animal diagnostic services market. In India, the Insurance Regulatory and Development Authority (IRDA) regulates pet insurance policies, offering a range of coverage options for pets such as dogs, cattle, horses, and birds. Pet insurance plans can be tailored to meet various needs, including third-party liability coverage. This type of insurance protects pet parents in the event their pet causes harm to a third party, such as biting or assaulting someone, or causing property damage. The insurance coverage amounts typically range from Rs 15,000 to Rs 50,000, depending on the policy. Notably, most pet insurance providers in India offer coverage for all dog breeds, including both exotic and local varieties. The premium for pet insurance is generally calculated as a percentage of the insured value, ranging from 3% to 5%. This structure provides pet owners with flexible options for securing their pets and managing potential liabilities, while also creating opportunities for insurers to tap into a growing market for pet-related financial products in India.

Pet insurance encourages pet owners to take their pets for regular veterinary check-ups and diagnostic tests. Regular check-ups can help detect health issues early, ensuring prompt treatment, and potentially saving the lives of many beloved pets. Pet insurance coverage often includes diagnostics such as MRI, CT scans, and specialized blood tests. As a result, pet owners are more willing to invest in advanced diagnostic procedures, contributing to the expansion of the companion animal diagnostic services market. Pet insurance alleviates the financial burden associated with veterinary care, making it more affordable for pet owners to invest in comprehensive diagnostic services. This translates into higher demand for these services and drives market growth. The demand for high-quality diagnostic services in the pet healthcare industry has spurred technological advancements. This, in turn, has led to more accurate and

efficient diagnostic tools and procedures. Pet insurance providers often educate pet owners about the benefits of regular veterinary visits and early disease detection. This education is driving a shift towards proactive pet healthcare, boosting the companion animal diagnostic services market.

Key Market Challenges

Increasing Cost Pressures

One of the foremost challenges in the companion animal diagnostic services market is the increasing cost pressures. The demand for advanced diagnostic tests and procedures is driving up costs, making it challenging for pet owners to afford these services. In many cases, the burden of these costs falls on veterinary clinics, which can struggle to maintain competitive pricing while providing high-quality care.

Industry stakeholders should focus on cost-effective diagnostic solutions and explore partnerships with diagnostic equipment manufacturers to negotiate favorable pricing. Additionally, promoting pet insurance can help alleviate financial stress for pet owners.

Limited Access to Specialized Services

Many regions, especially rural areas, lack access to specialized companion animal diagnostic services. This limited accessibility restricts pet owners from accessing the best possible care for their animals, leading to suboptimal diagnostic and treatment outcomes.

Telemedicine and telehealth solutions can help bridge the gap by enabling remote consultations and diagnostic services. Veterinary clinics in underserved areas could also receive training and equipment to provide advanced diagnostics.

Key Market Trends

Technological Advancements

In recent years, the pet industry has witnessed a remarkable transformation, thanks to the increasing technological advancements in veterinary medicine. This evolution has not only improved the overall health and well-being of our beloved furry companions but has also given rise to a booming global companion animal diagnostic services market. The market's growth can be attributed to a convergence of factors, including the rapid

development of innovative diagnostic tools and the rising demand for superior healthcare for pets. One of the primary drivers behind the growth of the companion animal diagnostic services market is the rapid progression of diagnostic technology. Veterinarians now have access to an array of sophisticated tools that enable them to diagnose diseases, conditions, and health issues in pets with a precision and efficiency that was previously unimaginable.

High-definition ultrasound, magnetic resonance imaging (MRI), and computed tomography (CT) scans are some of the imaging technologies that have revolutionized the diagnosis and treatment of companion animals. These tools offer detailed insights into a pet's health, aiding in the early detection of issues. The development of point-of-care diagnostic devices has brought diagnostics closer to home. These handheld devices allow veterinarians to conduct on-the-spot tests for various conditions, including blood tests and urinalysis. Rapid results mean faster treatment and improved outcomes. The rise of telemedicine and telehealth platforms has made it easier for pet owners to access expert advice from veterinarians, no matter where they are located. This technology has not only increased convenience but also broadened the reach of veterinary services. Genetic testing has become increasingly popular in the veterinary world. It can provide valuable insights into a pet's predisposition to certain diseases, enabling preventive measures and tailored healthcare plans. The advent of pet wearables, such as fitness trackers and GPS collars, has made it easier for pet owners to monitor their animals' health and location. These devices can also alert owners and veterinarians to potential issues.

The increasing awareness about the importance of preventive healthcare and early disease detection for companion animals is another critical driver of the diagnostic services market. Pet owners are more proactive in seeking regular check-ups for their pets, which has led to a surge in demand for diagnostic services. Veterinary practices and diagnostic laboratories have also adapted to this change by expanding their services and offering comprehensive wellness packages for pets. The market now offers a variety of testing options, from routine check-ups to specialized diagnostics for specific conditions.

Segmental Insights

Testing Insights

Based on the category of Testing, Clinical Chemistry emerged as the dominant player in the global market for Companion Animal Diagnostic Services in 2024. Clinical chemistry

refers to the analysis of blood, serum, and other bodily fluids to evaluate the overall health of companion animals. This segment of diagnostic services offers a broad spectrum of information about an animal's health status, including organ function, blood cell counts, electrolyte balance, and more. Clinical chemistry provides a holistic view of an animal's health by assessing various parameters such as liver and kidney function, glucose levels, and electrolyte balance. This breadth of information helps veterinarians make accurate diagnoses and create tailored treatment plans. Clinical chemistry typically involves blood or serum samples, which can be obtained through minimally invasive procedures. This reduces stress and discomfort for the animals, making it a more preferred diagnostic method.

Animal Type Insights

The dogs segment is projected to experience rapid growth during the forecast period. Hospitals and clinics are equipped with a multidisciplinary team of healthcare professionals, including gastroenterologists, colorectal surgeons, oncologists, genetic counselors, and radiologists. This team approach ensures that patients receive comprehensive care, from diagnosis to treatment and long-term management. These healthcare facilities are equipped with advanced diagnostic tools, such as colonoscopy, endoscopy, genetic testing, and imaging modalities, which are crucial for early diagnosis and monitoring of Gardner Syndrome.

Regional Insights

North America emerged as the dominant region in the global Companion Animal Diagnostic Services market in 2024, holding the largest market share in terms of value. One of the primary reasons for North America's leadership in the companion animal diagnostic services market is its focus on innovation and technological advancement. The region is home to several leading veterinary diagnostic service providers that continually invest in cutting-edge technology. These advancements have allowed for faster, more accurate diagnoses, leading to improved treatment options and better outcomes for companion animals. North America boasts a robust and diverse economy that supports a high level of pet ownership. As a result, pet owners in this region are more inclined to invest in their animals' health, including diagnostic services. The increasing disposable income of pet owners allows for greater expenditure on veterinary care, further driving the demand for companion animal diagnostic services. North America has one of the highest rates of pet ownership in the world. According to the American Pet Products Association's 2021-2022 National Pet Owners Survey, approximately 70% of U.S. households own pets, marking an increase from 67% in the

previous 2019-2020 survey. The survey highlights that millennials represent the largest segment of pet owners, accounting for 32% of the total, followed by baby boomers at 27% and Generation X at 24%. This trend reflects the growing importance of pets in households, with millennials leading the charge in pet ownership across the United States. This high prevalence of companion animals creates a substantial demand for diagnostic services such as regular check-ups, screenings, and specialized tests, fostering the growth of the industry.

Key Market Players

Zoetis Services LLC

IDEXX Laboratories, Inc.

Mars Inc.

The Animal Medical Center

Embark Veterinary, Inc.

SYNLAB

NationWide Laboratories

IVC Evidensia

CVS Group Plc

Greencross Vets

Report Scope:

In this report, the Global Companion Animal Diagnostic Services Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Companion Animal Diagnostic Services Market, By Testing:

Clinical Chemistry

Microbiology

Parasitology

Histopathology

Cytopathology

Hematology

Immunology & Serology

Imaging

Molecular Diagnostics

Others

Companion Animal Diagnostic Services Market, By Type:

Point-of-Care (POC)

Laboratory-based

Companion Animal Diagnostic Services Market, By Animal Type:

Dogs

Cats

Horses

Others

Companion Animal Diagnostic Services Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Companion Animal Diagnostic Services Market.

Available Customizations:

Global Companion Animal Diagnostic Services market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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