

GCC Veterinary Laboratories Market, By Testing Type (Microbiology, Hematology, Clinical Chemistry, Pathology, Immunology, Others), By Animal Type (Livestock Animals, Companion Animals), By Services (Diagnostic Services, Consulting Services, Research Services, Reference Laboratories), By End User (Veterinary Hospitals & Clinics, Pharmaceutical & Biotechnology Companies, Academic & Research Institutes, Others), By Country and Competition, Forecast & Opportunities, 2018-2028F

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Abstracts

The GCC Veterinary Laboratories Market was valued at USD 525.03 Million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.30% through 2028. The GCC Veterinary Laboratories Market is a vital and rapidly growing sector in the Gulf Cooperation Council (GCC) region, encompassing the countries of Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates. This market plays a pivotal role in safeguarding animal health, ensuring food safety, and supporting the thriving agriculture and pet care industries in the GCC. One of the primary drivers of the GCC Veterinary Laboratories Market is the region's increasing focus on animal health and welfare. As the demand for high-quality and safe animal products, such as meat, dairy, and poultry, continues to rise, there is a heightened need for robust veterinary diagnostics and testing services. These services are essential for disease surveillance, early detection, and the prevention of zoonotic diseases that can affect both animals and humans.

Furthermore, the GCC region has witnessed a significant increase in pet ownership, with a growing awareness of responsible pet care. This trend has fueled the demand for veterinary services, including diagnostic testing and laboratory services for companion animals. The rise in pet humanization has also led to a surge in the adoption of advanced diagnostics and treatments for pets, further boosting the Veterinary Laboratories Market. Additionally, the GCC countries are investing heavily in modernizing their agricultural and livestock sectors to enhance food security and self-sufficiency. Robust veterinary laboratories are essential for monitoring and managing animal health, ensuring the safety of animal-derived food products, and supporting disease control measures.

Moreover, the GCC Veterinary Laboratories Market benefits from advancements in diagnostic technologies, including molecular biology, immunology, and imaging techniques. These innovations enable more accurate and rapid diagnosis of animal diseases, contributing to better disease management and control. In conclusion, the GCC Veterinary Laboratories Market is poised for continued growth, driven by factors such as increased awareness of animal health, a rising pet population, and a commitment to modernizing agriculture. The region's strategic investments in veterinary infrastructure and the adoption of cutting-edge diagnostic technologies position it as a pivotal player in ensuring animal health and safety across diverse sectors.

Key Market Drivers

Rising Pet Ownership is Thriving the GCC Veterinary Laboratories Market

The primary driver behind the expansion of veterinary laboratories in the GCC region is the increasing trend of pet ownership. As the affluent middle class grows and disposable income increases, more people are choosing to keep pets, including dogs, cats, and exotic animals. This has led to a greater demand for veterinary services, including diagnostic tests and medical treatments, thereby driving the growth of veterinary laboratories.

As the standard of living in these countries has risen over the years, so has the interest in pet ownership. As per Dubai Municipality, 1,49,131 companion animals were registered in 2021. Further, the GCC has seen a parallel growth in the pet care industry. There are now more pet-friendly parks, grooming salons, pet stores, and veterinary clinics available, making it easier for pet owners to provide for their pets' needs.

Several factors have contributed to this surge in pet ownership. Urbanization and a

growing middle class have made it easier for families to accommodate pets in their homes. Additionally, a greater awareness of the therapeutic benefits of having pets has led to a shift in attitude for pet ownership towards animals. The younger generation, in particular, views pets as companions that provide emotional support and enhance their overall quality of life.

As pet ownership has grown, so has the need for comprehensive veterinary care. Pet owners in the GCC are increasingly seeking high-quality healthcare services for their beloved animals. This demand for better pet healthcare has led to significant advancements in veterinary medicine and a corresponding expansion of veterinary laboratories in the region.

There is a growing awareness of the physical and emotional benefits of pet ownership. Studies from Mental Health Foundation have shown that having pets can reduce stress, anxiety, and depression, promoting overall well-being. As people in the GCC become more health-conscious, they are recognizing these advantages of having pets.

The rapid growth of the GCC veterinary laboratories market presents lucrative opportunities for investors and entrepreneurs. As pet ownership continues to rise, the demand for veterinary services and diagnostics is expected to soar even higher. This trend has led to increased investment in the development of cutting-edge veterinary laboratories across the region.

Increasing Livestock Farming in the GCC Region

The livestock farming industry in the GCC has seen substantial growth, and with it, the demand for veterinary services and laboratories has soared proportionately.

Recognizing the need to reduce their dependence on oil revenues, GCC nations have diversified their economies. Agriculture, including livestock farming, has become a vital part of this diversification strategy. As per GCC- Stat, 40.9 million livestock animals are present in GCC countries in 2021. Saudi Arabia had the highest number of livestock out of all the GCC countries in 2021 which was 30,266,179 and UAE comes at the second place with 5,054,462 livestock animals. With a growing population and changing dietary preferences, there is a surging demand for high-quality protein sources, particularly from animal products like meat, milk, and eggs, leading to the expansion of GCC veterinary laboratories market in the projected period.

Ensuring food security is a top priority for GCC governments. By investing in domestic

livestock production, these nations aim to reduce their reliance on imported meat and dairy products, thereby propelling the growth of GCC veterinary laboratories market. With the emphasis on food safety and quality, veterinary laboratories are responsible for conducting tests and analyses on animal products. These tests ensure that meat, milk, and other animal-derived products meet the highest safety and quality standards. GCC countries have been investing heavily in modernizing their livestock farming practices. Advanced technologies, such as precision agriculture and smart farming techniques, have been adopted to enhance productivity and animal health. As per Foreign Agricultural Service/USDA Global Market Analysis, 910,000 metric tones chicken meat was produced in Saudi Arabia in July 2023.

Additionally, livestock farmers in the region are becoming more aware of the importance of regular health check-ups and disease prevention measures, driving the demand for veterinary laboratory services in GCC countries. Also, livestock farming presents economic opportunities for both small-scale and large-scale producers. It generates income, creates jobs, and stimulates economic growth in rural areas, contributing to overall economic development, hence augmenting the growth of GCC veterinary laboratories market.

Growing Awareness of Zoonotic Diseases is Driving the GCC Veterinary Laboratories Market

Zoonotic diseases have gained prominence in all the GCC countries due to their potential to cause pandemics and public health crises. Diseases like COVID-19, which likely originated in bats and was transmitted to humans, have underscored the importance of proactive measures to detect and prevent zoonotic outbreaks. The GCC region, known for its vibrant pet culture, livestock industry, and wildlife biodiversity, is particularly vulnerable to these diseases.

GCC governments have recognized the need for proactive measures to address the risks associated with zoonotic diseases. As a result, they have been investing heavily in veterinary infrastructure, including laboratories. Governments are collaborating with international health organizations and experts to enhance disease surveillance, early detection, and response capabilities. These investments are aimed at safeguarding public health, ensuring food safety, and protecting the region's rich biodiversity, hence augmenting the growth of GCC Veterinary Laboratories Market.

The national regulations for various zoonotic illnesses, such as brucellosis, CCHF, leishmaniasis, Middle East Respiratory Syndrome Coronavirus (MERS-CoV), rabies,

schistosomiasis, and foodborne diseases, have been established. The guidelines and the comprehensive healthcare approach to be implemented through the zoonotic strategy, including the Associated Standard Operating Procedures like contact tracing, have been documented in the Communicable Diseases Manual provided by Ministry of Health, Sultanate of Oman.

According to the Saudi Press Authority and trusted national news sources, the Animal Disease Surveillance and Control Program began its activities in March 2017. It operates under the Ministry of Environment, Water, and Agriculture (MEWA) and is a crucial part of the National 2020 Strategy.

The national zoonotic surveillance program in Oman is an integral component of the comprehensive communicable disease surveillance system, with the primary goal of minimizing the incidence and fatality rates associated with zoonotic diseases.

Veterinary laboratories play a crucial role in monitoring the health of wildlife populations and detecting potential disease outbreaks. As the awareness of these interconnections grows, so does the demand for advanced diagnostic capabilities in veterinary laboratories.

Key Market Challenges

Limited Skilled Workforce

One of the primary challenges faced by the GCC veterinary laboratories is the scarcity of qualified veterinarians. To perform accurate diagnostic tests, interpret results, and ensure the health of animals, veterinarians with specialized knowledge and skills are required. Unfortunately, the region faces a shortage of such professionals, leading to increased workloads and potential diagnostic errors.

Veterinary laboratories rely heavily on laboratory technicians for sample collection, preparation, and analysis. These technicians are responsible for operating sophisticated diagnostic equipment and ensuring the accuracy of results. The shortage of skilled laboratory technicians can result in delays in diagnoses and potentially incorrect findings.

High Operating Cost

High operating costs can lead to limited access to veterinary care, especially for pet

owners and farmers with limited financial resources. This can result in delayed diagnoses and treatment, potentially compromising animal health, which may hamper the growth of GCC veterinary laboratories market during the forecast period.

High costs may deter laboratories from investing in research and development projects, slowing down advancements in veterinary medicine and the development of locally relevant solutions.

GCC countries may rely on importing veterinary diagnostic services and products due to the high cost of local production. This dependence on foreign sources can affect national security and economic sustainability.

Supply Chain Disruptions

The GCC heavily relies on international suppliers for diagnostic equipment, reagents, and consumables used in veterinary laboratories. Any disruptions in the global supply chain, can lead to delays in procuring essential items. This not only affects the efficiency of laboratory operations but can also result in financial losses.

If supply chain disruptions persist, they may hinder the growth potential of the veterinary laboratories market in the GCC. Investors and entrepreneurs may be reluctant to enter the market, fearing instability and uncertainty.

Supply chain disruptions often necessitate expedited shipping and alternative procurement methods, resulting in higher costs for veterinary laboratories. These additional expenses may ultimately be passed on to clients, potentially affecting the affordability of veterinary services.

Key Market Trends

Rising Technological Advancements

Advancements in technology have revolutionized the veterinary healthcare industry. Modern diagnostic tools, including molecular biology techniques, imaging systems, and telemedicine, have made it easier to diagnose and treat animal diseases. Veterinary laboratories have embraced these technologies to offer faster and more accurate diagnostic services, attracting a broader clientele and fostering market growth, which will further propel the growth of the market during the projected period.

Increasing Government Initiatives

Governments in the GCC region understand the significance of disease surveillance and control in maintaining animal health and preventing the spread of zoonotic diseases. They have launched comprehensive programs that involve veterinary laboratories in monitoring and controlling diseases among both domestic and wild animals. These efforts are crucial for safeguarding public health and the livestock industry. To foster innovation in the veterinary sector, GCC governments have allocated funding for research and development projects. Veterinary laboratories play a central role in conducting research to develop new vaccines, treatments, and diagnostic methods. The research conducted in these laboratories contributes to advancements in animal health and veterinary medicine.

Training and Infrastructure Development

To meet the increasing demand for veterinary services, GCC countries have been focusing on developing a highly skilled workforce. This involves training programs and educational initiatives aimed at producing qualified veterinarians, laboratory technicians, and other professionals. Continuous learning is essential in the field of veterinary medicine. Veterinary professionals in the GCC region are encouraged to participate in ongoing training and professional development programs to stay updated with the latest advancements in diagnostics, treatments, and laboratory techniques.

Rising Adoption of Dry Chemistry Analyzers in Veterinary Laboratories

Dry chemistry analyzers offer rapid results, allowing veterinarians to make timely decisions regarding the health of animals. This is especially crucial in emergency situations and for critical care patients, where every minute counts. These analyzers can perform a wide range of tests, including blood chemistry profiles, electrolyte analysis, liver and kidney function tests, and more. This versatility makes them suitable for various veterinary applications, from routine check-ups to complex disease diagnostics. While the initial investment in a dry chemistry analyzer may be relatively high, the long-term cost savings are significant. These analyzers reduce the need for multiple expensive reagents and equipment associated with traditional wet chemistry methods.

Professional Licensing and Accreditation

GCC countries have established rigorous licensing and accreditation processes for

veterinary professionals and laboratories. These processes ensure that only qualified and competent individuals and facilities operate in the veterinary sector. By maintaining high standards, these laws and regulations foster trust among consumers and enhance the reputation of veterinary laboratories, driving market growth.

Segmental Insights

Testing Type Insights

Based on the testing type, Hematology holds a dominant position in the GCC Veterinary Laboratories Market for several compelling reasons. Firstly, hematology diagnostics are fundamental to understanding and monitoring the health of animals, as blood-related disorders and conditions are prevalent among domestic and livestock animals in the region. Routine blood tests can provide crucial insights into an animal's overall health status, helping veterinarians detect and manage a wide range of diseases and conditions.

Secondly, as the GCC region places a strong emphasis on food safety and security, particularly in its thriving livestock and dairy sectors, hematology plays a critical role. Hematological tests are vital for screening animals for diseases like brucellosis and contagious bovine pleuropneumonia, ensuring that animals entering the food supply chain are healthy and safe for consumption. Additionally, the GCC's growing pet ownership culture and the increasing awareness of responsible pet care have spurred the demand for hematology services in veterinary laboratories. These services are essential for diagnosing and managing various blood-related conditions in companion animals. Furthermore, advancements in hematology diagnostic technologies have made it possible to perform comprehensive blood analysis rapidly and accurately. This has contributed to the dominance of hematology in the GCC Veterinary Laboratories Market, as veterinarians and animal health professionals rely on these tools to provide precise diagnoses and deliver optimal care to animals across the region.

Animal Type Insights

Based on the animal type, Companion animals, such as dogs, cats, and other pets, occupy a dominant position in the GCC Veterinary Laboratories Market for several compelling reasons. Firstly, there has been a substantial surge in pet ownership across the GCC region, driven by rising affluence, urbanization, and changing lifestyles. This burgeoning population of companion animals has led to a substantial increase in the demand for veterinary services, including diagnostic testing and laboratory services.

Secondly, pet owners in the GCC are increasingly viewing their animals as beloved family members, resulting in a heightened awareness of responsible pet care and a willingness to invest in their health and well-being. This cultural shift has translated into a significant demand for advanced veterinary diagnostics, including blood tests, pathology, and imaging services, which are often conducted in veterinary laboratories.

Moreover, the GCC's pet humanization trend has elevated expectations for the level of healthcare and diagnostic services available for companion animals. Pet owners seek comprehensive and state-of-the-art diagnostic assessments to ensure the early detection and effective management of health issues in their pets, further bolstering the dominance of companion animals in the Veterinary Laboratories Market. In conclusion, the rising population of companion animals and the evolving mindset of pet owners in the GCC have made this segment the primary focus for veterinary laboratories. The demand for advanced diagnostics and healthcare services for pets is a significant driver of growth and innovation in the GCC Veterinary Laboratories Market.

Country Insights

Saudi Arabia holds a dominant position in the GCC Veterinary Laboratories Market due to several key factors. Firstly, the Kingdom of Saudi Arabia has a large and diverse population of both livestock and companion animals. With extensive agricultural activities and a growing pet ownership culture, there is a substantial need for veterinary services and diagnostics.

Secondly, Saudi Arabia places a strong emphasis on food security and safety. The livestock sector is vital for the country's self-sufficiency in food production, and as such, stringent veterinary testing and disease surveillance are essential. Veterinary laboratories in Saudi Arabia play a pivotal role in monitoring the health of livestock, ensuring the safety of animal-derived food products, and supporting the control of zoonotic diseases.

Additionally, the Kingdom has been investing significantly in modernizing its veterinary infrastructure, including laboratory facilities, as part of its Vision 2030 program. This commitment to enhancing the veterinary healthcare system positions Saudi Arabia as a hub for veterinary diagnostics and research in the GCC.

Furthermore, Saudi Arabia's strategic location in the region and its economic strength contribute to its dominance in the Veterinary Laboratories Market. It serves as a major destination for veterinary diagnostics and services not only for its domestic needs but

also for neighboring GCC countries. In conclusion, Saudi Arabia's large and diverse animal population, emphasis on food security, investment in veterinary infrastructure, and strategic regional position make it the dominant force in the GCC Veterinary Laboratories Market.

Key Market Players

The Veterinary Hospital

Elite Veterinary Clinic

Al Fiafy Veterinary Care Company

Capital Veterinary Centre L.L.C

Bahrain Veterinary Center

All Care Veterinary Clinic W.L.L

Companion Clinic

Advanced Veterinary Center

SINA VET CLINIC

Sama Capital Healthtech

Dragon Animal Care Center

Petcare Veterinary Center

Gulf Vetcare

Zabeel Veterinary Hospital

Salam Veterinary Group

International Veterinary Hospital

Blue Cross Veterinary Clinic

American Veterinary Clinic

Global Veterinary Services & Agriculture

The German Veterinary Clinic

Report Scope:

In this report, the GCC Veterinary Laboratories Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

GCC Veterinary Laboratories Market, By Testing Type:

Microbiology

Hematology

Clinical Chemistry

Pathology

Immunology

Others

GCC Veterinary Laboratories Market, By Animal Type:

Livestock Animals

Companion Animals

GCC Veterinary Laboratories Market, By Service:

Diagnostic Services

Consulting Services

Research Services

Reference Laboratories

GCC Veterinary Laboratories Market, By End User:

Veterinary Hospitals & Clinics

Pharmaceutical & Biotechnology Companies

Academic & Research Institutes

Others

GCC Veterinary Laboratories Market, By Country:

Saudi Arabia

UAE

Oman

Kuwait

Qatar

Bahrain

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the GCC Veterinary Laboratories Market.

Available Customizations:

The GCC Veterinary Laboratories Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following

GCC Veterinary Laboratories Market, By Testing Type (Microbiology, Hematology, Clinical Chemistry, Pathology,...

customization options are available for the report:

Company Information

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

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