

India Veterinary Diagnostics Market By Product (Consumables, Instruments), By Technology (Clinical Biochemistry, Molecular Diagnostics, Hematology, Urinalysis, Immunodiagnosics, Others), By Animal Type (Companion Animals, Livestock), By Disease Type (Infectious Disease, Endocrinology, Oncology, Cardiology, Others), By End User (Veterinary Reference Laboratories, Veterinary Hospitals & Clinics, Point-of-care/ In-house Testing, Veterinary Research Institutes & Universities), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

India Veterinary Diagnostics Market was valued at USD 199.32 Million in 2024 and is expected to reach USD 436.37 Million by 2030 with a CAGR of 13.91% during the forecast period. The veterinary diagnostics market in India is experiencing robust growth, driven by factors such as increasing pet ownership, particularly in urban areas, and the rising demand for animal-based food products. As the middle class expands and disposable incomes rise, more people are investing in the health and well-being of their pets, spurring the need for diagnostic services. In addition, the livestock sector, essential for dairy, poultry, and meat production, fuels the demand for veterinary diagnostics to manage disease prevention and improve productivity. Technological advancements, including the adoption of PCR testing, digital imaging, and point-of-care devices, are further enhancing the market's growth by providing faster, more accurate results.

However, the market faces challenges such as limited awareness and access to advanced diagnostic tools in rural areas, which can hinder the widespread adoption of such services. Additionally, the high cost of some diagnostic technologies may be a barrier for smaller veterinary clinics, especially in remote regions. The fragmentation of the veterinary services sector and the lack of trained professionals in some parts of the country also pose challenges to market expansion. Despite these hurdles, the ongoing urbanization, increasing disposable incomes, and growing awareness of animal health continue to drive the market's positive trajectory in India.

Key Market Drivers

Increasing Pet Ownership

Increasing Pet Ownership in India is one of the key drivers of the veterinary diagnostics market, as more people adopt pets and prioritize their health and well-being. Over the past few years, pet ownership in India has seen a significant surge, driven by changing lifestyles, increasing disposable income, and a growing awareness of the importance of animal care. As urbanization continues, more individuals and families are adopting pets, particularly dogs and cats, which has led to a greater demand for veterinary healthcare services, including diagnostics.

In India, there are currently over 31 million pet dogs and 2.44 million pet cats. The pet cat population is expected to grow substantially, with projections suggesting that it may reach 4.89 million by 2026. This growth in pet ownership reflects the increasing attachment people have to their pets, with many considering them as family members. As a result, there is a rising demand for veterinary services, including regular health check-ups, vaccinations, and diagnostic tests, to ensure the health and longevity of pets.

The sector's robust growth is driven by increasing consumption of dairy and meat products, as well as expanding export opportunities. However, with this growth comes the need for better management and health practices within livestock farming. To maximize productivity and prevent losses due to diseases, farmers are increasingly adopting veterinary diagnostics for disease detection, health monitoring, and ensuring the quality and safety of animal products.

The CAGR of the livestock sector from 2014-15 to 2022-23 was 12.99%, indicating a strong and sustained increase in the sector's output. This growth is a testament to the rising importance of livestock farming in India's economy and the need for advanced

veterinary diagnostics to support this sector's continued expansion. As farmers invest in improving the health of their herds to meet both domestic and international demands, the veterinary diagnostics market will continue to experience significant growth.

Key Market Challenges

Lack of Awareness and Accessibility in Rural Areas

One of the major challenges hindering the full utilization of veterinary diagnostic services is the lack of awareness and accessibility, especially in rural areas where the majority of livestock farmers reside. While urban centers have access to modern veterinary care and diagnostics, rural regions are often underserved due to several factors, including limited infrastructure, a lack of veterinary professionals, and financial constraints.

Many rural farmers still lack a clear understanding of the importance of veterinary diagnostics for maintaining livestock health and productivity. Traditional farming practices, often passed down through generations, focus more on conventional methods of care rather than preventive health measures. As a result, many farmers do not prioritize early diagnosis or regular health check-ups for their animals, which can lead to delayed detection of diseases and poor animal welfare.

For example, farmers may not recognize symptoms of diseases such as mastitis, foot-and-mouth disease, or avian influenza until it is too late, resulting in reduced milk production, weight loss, or even death of animals. This leads to not only economic losses for the farmers but also poses a broader risk to the agricultural ecosystem, especially when infectious diseases spread across livestock populations.

Limited Accessibility to Veterinary Services: Veterinary diagnostics require advanced tools and equipment that may not be readily available in rural areas. Inadequate infrastructure, including a shortage of well-equipped veterinary clinics, diagnostic laboratories, and trained professionals, makes it challenging for farmers to access essential services. Even when these services are available, they may be geographically distant or too costly for many small-scale farmers to afford.

Key Market Trends

Technological Advancements

Technological Advancements in veterinary diagnostics are playing a pivotal role in transforming the landscape of animal healthcare in India. As the demand for more efficient and accurate diagnostics grows, the adoption of cutting-edge technologies has become essential for improving the quality and accessibility of veterinary care. With the increasing complexity of animal diseases and the need for early detection, modern diagnostic tools and innovations are helping veterinarians provide more effective treatments, enhance animal welfare, and improve productivity in livestock farming.

The integration of genomic technologies in veterinary diagnostics has revolutionized the ability to identify genetic disorders and predict disease susceptibility in animals. These advancements allow for earlier detection and more precise treatments for genetic conditions, ultimately reducing the risk of widespread outbreaks. Additionally, the use of point-of-care diagnostic devices has made veterinary diagnostics more accessible, especially in remote areas. These portable, user-friendly devices enable rapid testing for various diseases without the need for sending samples to distant laboratories, significantly improving the turnaround time for results.

Moreover, digital platforms and artificial intelligence (AI) are transforming how data is collected, analyzed, and interpreted in veterinary care. AI algorithms can analyze patterns in diagnostic data, such as blood tests or imaging scans, to assist in diagnosing conditions that may be overlooked by human clinicians. Telemedicine has also gained momentum, allowing veterinarians to remotely diagnose and monitor animals, providing timely consultations for farmers in rural areas who may not have easy access to veterinary clinics.

The rise of big data analytics in veterinary diagnostics is enabling the collection and analysis of vast amounts of data from different sources, including animal health records, environmental conditions, and diagnostic tests. This data can be used to track disease trends, identify potential health risks, and improve preventive measures on farms. These technological advancements are helping to drive precision medicine in veterinary care, ensuring that treatment plans are personalized to meet the specific needs of each animal.

Key Market Players

Embark India

IDEXX Laboratories, Inc.

Zoetis India Limited

Thermo Fisher Scientific Inc.

bioMérieux

Bio-Rad laboratories India Pvt.Ltd

FUJIFILM India Private Limited

Virbac Animal Health India Private Limited

BioNote, Inc.

Report Scope

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

India Veterinary Diagnostics Market, By Product:

Consumables

Instruments

India Veterinary Diagnostics Market, By Technology:

Clinical Biochemistry

Molecular Diagnostics

Hematology

Urinalysis

Immunodiagnostics

Others

India Veterinary Diagnostics Market, By Animal Type:

Companion Animals

Livestock

India Veterinary Diagnostics Market, By Disease Type:

Infectious Disease

Endocrinology

Oncology

Cardiology

Others

India Veterinary Diagnostics Market, By End User:

Veterinary Reference Laboratories

Veterinary Hospitals & Clinics

Point-of-care/ In-house Testing

Veterinary Research Institutes & Universities

India Veterinary Diagnostics Market, By Region:

East India

West India

North India

South India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Veterinary Diagnostics Market.

Available Customizations:

India Veterinary Diagnostics 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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