

# **Saudi Arabia Veterinary Diagnostics Market By Animal Type (Dogs, Cats, Horses, Others), By Testing (Clinical Chemistry, Microbiology, Parasitology, Histopathology, Hematology, Others), By Region and Competition, Forecast & Opportunities, 2020-2030F**

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## **Abstracts**

Saudi Arabia Veterinary Diagnostics Market was valued at USD 24.15 Million in 2024 and is expected to reach USD 29.81 Million by 2030 with a CAGR of 3.77% during the forecast period. Saudi Arabia has a well-established livestock industry, with major contributions from poultry, cattle, and small ruminants. As the country continues to focus on food security and self-sufficiency in animal products, the demand for veterinary diagnostics in the livestock sector is rising. Early detection of diseases and monitoring of animal health are essential to prevent outbreaks, optimize herd management, and ensure high-quality meat and dairy production. Veterinary diagnostics play a key role in maintaining the health of animals, which is critical for both economic and public health reasons.

In parallel with the growing livestock industry, Saudi Arabia has also seen an increase in pet ownership, particularly in urban areas. With the rise of companion animals, pet healthcare has become a priority for many Saudi families. Pet owners are more likely to seek veterinary care and diagnostic services to ensure the well-being of their animals. As a result, the market for veterinary diagnostics for pets, including advanced testing for diseases and conditions, is expanding rapidly.

Despite the promising growth prospects, the Saudi veterinary diagnostics market faces several challenges. One of the primary hurdles is the relatively high cost of advanced diagnostic tools, which may be a barrier for smaller veterinary clinics and local animal farmers. Additionally, the adoption of new technologies can be slow due to the need for

specialized training and expertise. There is also a gap in local production capabilities for some high-end diagnostic equipment, meaning that many tools must be imported, which can add to the cost and limit accessibility.

## Key Market Drivers

### Growth in Veterinary Diseases

The growth in veterinary diseases is emerging as a significant driver of the veterinary diagnostics market in Saudi Arabia. The MERS-CoV team in Saudi Arabia was among the first to address the issue in both wild and domesticated animals. In early 2014, the team successfully produced a prevalence map of the virus in camels across the Kingdom. Subsequent efforts focused on screening various wild animals, including bats, carnivores, ungulates, and rodents. Additionally, studies were conducted to evaluate potential transmission routes to human populations, leading to noteworthy findings that are set to be published in the near future. As the country experiences an increase in the prevalence of both infectious and non-infectious veterinary diseases, the demand for advanced diagnostic solutions is rising. This trend is particularly notable in the livestock and poultry sectors, which play a crucial role in Saudi Arabia's food security and agricultural economy. The increasing incidence of veterinary diseases necessitates timely and accurate diagnostic tools to prevent, manage, and control outbreaks, driving market growth.

Border disease is a viral infection affecting sheep and goats, leading to significant economic losses globally. This study aimed to investigate the prevalence of border disease in sheep and goats across two northern regions of Saudi Arabia. A total of 624 serum samples were collected from 155 sheep and 217 goats in the Hail region, as well as 144 sheep and 108 goats in the Rafha region. Antibodies against pestivirus were detected using competitive ELISA. The overall prevalence of pestivirus antibodies was 18.4%, with sheep exhibiting the highest seroprevalence at 20.7%. Among the regions, Rafha demonstrated the highest seroprevalence. The findings indicate the active circulation of border disease in sheep and goats in northern Saudi Arabia.

Saudi Arabia's veterinary diagnostics market is being fueled by heightened awareness among pet owners, farmers, and government agencies regarding the importance of early detection and disease management. The rise in diseases such as avian influenza, foot-and-mouth disease, and various zoonotic infections is prompting a need for more sophisticated diagnostic technologies. These diseases not only affect the health and welfare of animals but also pose significant risks to public health, food safety, and the

economy, thereby increasing the demand for diagnostic products and services.

Moreover, the growth of the country's livestock and poultry industries, in response to rising domestic demand and government initiatives to increase local production, is driving the need for improved veterinary care and diagnostics. With a larger animal population to monitor, the adoption of diagnostic tools, including molecular diagnostics, immunodiagnosics, and point-of-care devices, is becoming essential. These advanced technologies enable quick, accurate results, which are critical for effective disease prevention and management strategies.

### Surge in Technological Advancements

The surge in technological advancements has become a significant driver of the Saudi Arabia veterinary diagnostics market, propelling the sector toward enhanced efficiency, accuracy, and accessibility. As a leader in in vitro diagnostics, bioMérieux is dedicated to extending its expertise to veterinary healthcare. Veterinary laboratories require solutions that provide exceptional workflow efficiency and reliable results to support veterinarians in making swift and accurate diagnoses. The company's advanced solutions are already in use at prominent veterinary laboratories. bioMérieux offers products tailored to veterinary needs, such as the VITEK 2 AST VET cards and VIDAS VET-compatible assays. Furthermore, their automated systems and reagents streamline processes and reduce time to results. As the demand for advanced healthcare solutions for animals continues to grow, the integration of cutting-edge technologies is transforming diagnostic processes, thereby contributing to the market's expansion.

One of the key technological drivers is the widespread adoption of molecular diagnostics, which allows for the rapid and precise identification of pathogens at a genetic level. This advancement has revolutionized disease detection in animals, enabling veterinarians to diagnose conditions with greater accuracy and speed. The use of polymerase chain reaction (PCR) technology and next-generation sequencing (NGS) is particularly important for detecting infectious diseases and genetic disorders, thus improving treatment outcomes and animal health management.

In addition, the rise of point-of-care (POC) diagnostic devices has enhanced the accessibility of veterinary diagnostics. These devices allow for quick and on-site testing, reducing the need for complex laboratory procedures and enabling veterinarians to make real-time decisions. The availability of portable diagnostic tools also improves the timeliness of veterinary care, which is crucial in both companion animal care and

livestock management.

## Key Market Challenges

### High Cost of Advanced Diagnostic Equipment

For veterinary clinics, particularly smaller establishments, the investment required for high-end diagnostic equipment can be prohibitive. Technologies such as PCR (Polymerase Chain Reaction) testing, immunoassay systems, and digital imaging devices are crucial for the effective detection of diseases in animals. However, the capital expenditure involved in purchasing and maintaining these tools may exceed the financial capacity of smaller clinics. This could limit access to advanced diagnostic capabilities, thereby impacting the quality of veterinary care and disease management offered to patients.

Similarly, livestock farmers, particularly those in rural areas, often face challenges in affording sophisticated diagnostic equipment to monitor the health of their herds. In Saudi Arabia's large agricultural sectors, where the management of livestock health is essential to maintaining food security and ensuring the quality of animal products, the inability to afford advanced diagnostic tools could result in delayed disease detection and costly outbreaks. This not only impacts farmers' productivity but could also pose risks to public health if zoonotic diseases are not identified promptly.

The initial high cost of advanced veterinary diagnostic equipment is only one part of the challenge. In addition, these tools often require specialized knowledge to operate and maintain, necessitating further investment in training and technical expertise. This additional financial burden further deters smaller players from embracing new technologies. Veterinary professionals may also require continual training to stay updated with the latest diagnostic techniques, which adds to operational costs.

## Key Market Trends

### Growth of Veterinary Clinics and Laboratories

The growth of veterinary clinics and laboratories is a prominent trend driving the expansion of Saudi Arabia's veterinary diagnostics market. Salam Veterinary Group, established in 2020, is the Kingdom of Saudi Arabia's premier veterinary research and treatment company, as well as the largest in the world. With investments exceeding 150 million riyals and covering an area of 71,500 square feet, it has the capacity to

accommodate over 8,000 animals simultaneously, earning the Guinness World Record for the largest veterinary hospital globally. The group features a cutting-edge research center equipped with state-of-the-art technology, focused on advancing animal production and disease treatment. Salam Veterinary Group is committed to offering high-quality services to animal owners while establishing itself as a unique global leader in the veterinary field. As the country's pet ownership increases and the livestock sector grows to meet rising food demand, there is a corresponding rise in the need for veterinary healthcare services. This trend is fostering the establishment and expansion of veterinary clinics and diagnostic laboratories across the kingdom, creating significant opportunities for the veterinary diagnostics market.

Saudi Arabia's growing middle class and changing lifestyles have led to higher pet ownership, particularly in urban areas. As pets become integral members of families, there is a growing demand for veterinary care, including routine checkups, vaccinations, and diagnostics. This shift in consumer behavior is encouraging the proliferation of veterinary clinics equipped with advanced diagnostic tools such as imaging devices, blood analyzers, and molecular diagnostic systems. Pet owners are increasingly seeking high-quality, specialized diagnostic services to ensure the health and well-being of their animals, driving the demand for veterinary diagnostics in both clinical and laboratory settings.

Additionally, the expansion of the country's livestock and poultry industries, driven by government initiatives to boost local food production and ensure food security, is further contributing to the growth of veterinary clinics and diagnostic laboratories. With the increasing size of the animal population, there is a greater need for veterinary services to monitor and manage animal health, prevent disease outbreaks, and ensure food safety. Diagnostic laboratories play a crucial role in supporting these efforts by providing essential testing services for diseases, pathogens, and other health conditions affecting livestock.

## Segmental Insights

### Animal Type Insights

Based on Animal Type, Dogs have emerged as the fastest growing segment in the Saudi Arabia Veterinary Diagnostics Market in 2024. One of the primary factors driving this growth is the increasing number of dog owners in Saudi Arabia, particularly among urban populations. As pet ownership becomes more prevalent, especially in middle- and high-income households, there is a corresponding rise in the need for veterinary care.

Dogs, being the most common pets in the region, are the primary beneficiaries of this growing trend. As a result, veterinary diagnostic services tailored specifically to dogs, ranging from routine check-ups to advanced disease detection, have seen a surge in demand.

Moreover, advancements in diagnostic technologies, such as genetic testing, molecular diagnostics, and imaging, have contributed to the growing emphasis on canine health. These technologies allow for the early detection of diseases such as cancer, heart conditions, and genetic disorders, facilitating more effective treatments and better overall care. As these diagnostic tools become more accessible and affordable, dog owners are increasingly seeking early and precise diagnoses to ensure the longevity and quality of life for their pets.

### Testing Insights

Based on Testing, Clinical Chemistry have emerged as the fastest growing segment in the Saudi Arabia Veterinary Diagnostics Market during the forecast period. Clinical chemistry plays a crucial role in providing accurate and timely diagnostic results, particularly for diseases that affect animals' metabolic, endocrine, and organ function. As veterinary practices in Saudi Arabia increasingly prioritize precision medicine, clinical chemistry's ability to offer reliable and quick results has made it an essential tool. This demand for improved diagnostics, especially in detecting chronic and complex diseases, is driving the growth of the segment.

Recent technological innovations in clinical chemistry instruments, such as automated analyzers and high-throughput systems, have significantly enhanced diagnostic capabilities. These advancements enable faster, more accurate results with reduced human error, improving the efficiency of veterinary practices. As these technologies become more accessible, clinical chemistry solutions are increasingly being adopted across veterinary clinics, accelerating the segment's growth.

### Regional Insights

Based on Region, Northern & Central have emerged as the dominating region in the Saudi Arabia Veterinary Diagnostics Market in 2024. Central Saudi Arabia, particularly Riyadh, has the highest population density, which includes a significant number of pet owners. This urbanization leads to a higher demand for veterinary care and diagnostic services, making the region a key player in the market. As pet ownership continues to rise, especially in urban areas, the demand for advanced veterinary diagnostics also

increases, positioning Central and Northern regions at the forefront of this market.

Northern and Central Saudi Arabia are home to a significant portion of the country's agricultural activities, including large-scale livestock farming. These regions' strategic location near key farming areas leads to an increased need for veterinary diagnostics in livestock health, including disease detection and monitoring. As the country continues to focus on improving livestock health for both economic and food security reasons, these regions naturally dominate the veterinary diagnostics landscape.

### Key Market Players

SYSMEX LLC

Zoetis Services LLC

Thermo Fisher Scientific Inc.

Bio-Rad Laboratories, Inc.

FUJIFILM Holdings Corporation

### Report Scope

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

#### Saudi Arabia Veterinary Diagnostics Market, By Animal Type:

Dogs

Cats

Horses

Others

#### Saudi Arabia Veterinary Diagnostics Market, By Testing:

*Saudi Arabia Veterinary Diagnostics Market By Animal Type (Dogs, Cats, Horses, Others), By Testing (Clinical C...*

Clinical Chemistry

Microbiology

Parasitology

Histopathology

Hematology

Others

Saudi Arabia Veterinary Diagnostics Market, By Region:

Eastern

Western

Northern & Central

Southern

Competitive Landscape

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

Available Customizations:

Saudi Arabia Veterinary Diagnostics Market report with the given market data, Tech Sci 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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