

Veterinary Assistive Reproduction Technology Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029 Segmented By Product (Normal Semen, Sexed Semen), By Animal Type (Bovine, Swine, Ovine, Caprine, Equine, Other Animals), By Conception Method (Artificial Insemination, Embryo transfer (MOET), IVF), By Distribution Channel (Private, Public) Region and Competition

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Abstracts

Global Veterinary Assistive Reproduction Technology Market was valued at USD 2.44 Billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 7.08% through 2029. With the increasing demand for high-quality livestock and companion animals, coupled with growing awareness about genetic diseases and breeding-related issues, the veterinary assistive reproduction technology market has witnessed significant growth in recent years. Key components of this market include assisted reproductive techniques such as artificial insemination, embryo transfer, in vitro fertilization, and sperm and oocyte cryopreservation. These techniques are employed across various animal species, including cattle, pigs, horses, dogs, cats, and exotic species, to improve breeding efficiency, genetic diversity, and reproductive outcomes. The market is further fueled by advancements in biotechnology, genomics, and reproductive physiology, which have led to the development of innovative reproductive technologies and diagnostic tools.

Additionally, factors such as increasing pet ownership, rising demand for high-value animal products, and growing investments in animal healthcare infrastructure in

emerging economies are driving market growth. Companies operating in the veterinary assistive reproduction technology market are continually investing in research and development activities to introduce novel products and services, expand their product portfolios, and enhance their market presence. Moreover, strategic collaborations, partnerships, and acquisitions are becoming increasingly prevalent strategies among market players to strengthen their foothold in the competitive landscape.

However, challenges such as stringent regulatory requirements, ethical considerations surrounding the use of reproductive technologies in animals, and the high cost associated with advanced reproductive procedures may hinder market growth to some extent. Nevertheless, with the ongoing advancements in technology and increasing focus on animal welfare and productivity, the global veterinary assistive reproduction technology market is expected to continue its expansion trajectory in the foreseeable future. Key market trends to watch include the adoption of precision breeding techniques, the integration of artificial intelligence and big data analytics in reproductive management, and the emergence of customized reproductive solutions tailored to specific animal breeding objectives and challenges.

Key Market Drivers

Growing Demand for High-Quality Livestock and Companion Animals

The growing demand for high-quality livestock and companion animals is a significant driver behind the expansion of the global veterinary assistive reproduction technology market. As populations increase and dietary preferences shift towards higher-quality meat and animal products, there is a corresponding need for efficient and sustainable animal production systems. This demand extends to both livestock used in agriculture and companion animals kept as pets.

In the realm of agriculture, farmers and producers are increasingly turning to advanced reproductive technologies to enhance breeding efficiency and genetic diversity within their herds. Techniques such as artificial insemination, embryo transfer, and in vitro fertilization allow for the rapid propagation of superior genetic traits, such as disease resistance, meat quality, and reproductive performance. By utilizing these technologies, breeders can produce offspring with desirable characteristics more efficiently than traditional breeding methods, resulting in higher yields, improved animal welfare, and enhanced profitability.

Similarly, in the realm of companion animals, pet owners are seeking ways to ensure the health, longevity, and genetic soundness of their beloved pets. This has led to a growing demand for reproductive services such as sperm and oocyte cryopreservation, assisted reproductive procedures, and genetic screening. Pet owners are increasingly willing to invest in these technologies to address infertility issues, prevent hereditary diseases, and preserve the genetic lineage of their pets. Moreover, as the human-animal bond strengthens, pets are increasingly viewed as family members, further driving the demand for advanced reproductive solutions to ensure their well-being.

Furthermore, the globalization of the livestock trade and the rising demand for high-quality animal products in emerging economies have further fueled the need for advanced reproductive technologies. Countries seeking to enhance their agricultural productivity and food security are investing in modern breeding techniques to improve the performance and resilience of their livestock populations. This has created a growing market for veterinary assistive reproduction technology on a global scale, with opportunities for manufacturers, service providers, and research institutions to cater to the needs of diverse animal breeding industries worldwide.

Advancements in Biotechnology and Genomics

Advancements in biotechnology and genomics have been instrumental in driving the growth of the global veterinary assistive reproduction technology market. These technological innovations have revolutionized the field of veterinary reproductive medicine, offering new tools and techniques to enhance breeding outcomes and genetic management in animals. Biotechnology and genomics have enabled veterinarians and animal breeders to gain a deeper understanding of the genetic makeup and physiological processes underlying reproduction in animals. The mapping of animal genomes and the identification of genes associated with desirable traits such as disease resistance, productivity, and reproductive performance have provided valuable insights into the genetic potential of different species and breeds. This knowledge forms the foundation for the development of targeted breeding programs and the selection of superior breeding stock.

One of the key applications of biotechnology in veterinary reproduction is the development of assisted reproductive techniques (ARTs) that leverage advancements in molecular biology and reproductive physiology. Techniques such as in vitro fertilization (IVF), embryo transfer, and sperm and oocyte cryopreservation allow for the manipulation and preservation of genetic material with precision and efficiency. These ARTs enable breeders to overcome reproductive challenges such as infertility, low

fertility rates, and genetic disorders, thereby improving breeding efficiency and genetic diversity within animal populations.

Furthermore, genomics has facilitated the integration of genetic information into breeding decisions through techniques such as marker-assisted selection (MAS) and genomic selection (GS). MAS allows breeders to identify and select animals with desired genetic traits based on the presence of specific genetic markers associated with those traits. GS, on the other hand, uses genomic data to predict the breeding value of animals more accurately, enabling breeders to make informed decisions about which animals to breed and which traits to prioritize.

The combination of biotechnology and genomics has also led to the development of novel diagnostic tools and genetic screening assays that enable the early detection of hereditary diseases and genetic abnormalities in animals. These tools empower breeders to implement preventive measures and breeding strategies to minimize the transmission of undesirable traits and improve overall herd health.

Rising Awareness of Genetic Diseases and Breeding-related Issues

The rising awareness of genetic diseases and breeding-related issues is a significant factor driving the growth of the global veterinary assistive reproduction technology market. As stakeholders in the animal industry become increasingly cognizant of the impact of genetic disorders on animal health and productivity, there is a growing demand for advanced reproductive solutions to mitigate these challenges. One of the primary drivers behind the increased awareness of genetic diseases is the recognition of their detrimental effects on animal welfare and economic productivity. Hereditary diseases and genetic abnormalities can lead to a range of health problems in animals, including developmental disorders, congenital defects, and susceptibility to infectious diseases. In agricultural settings, the presence of genetic diseases can result in reduced fertility rates, lower growth rates, and increased mortality rates, leading to significant economic losses for producers. Similarly, in the companion animal sector, genetic disorders can cause suffering and reduced quality of life for pets, as well as emotional and financial burdens for their owners.

Moreover, advances in veterinary diagnostics and genetic testing have contributed to the heightened awareness of genetic diseases and breeding-related issues.

Veterinarians and breeders now have access to a wide range of diagnostic tools and genetic screening assays that enable them to identify and characterize genetic disorders in animals more accurately and efficiently. These tools empower stakeholders

to make informed breeding decisions, implement preventive measures, and develop targeted breeding strategies to reduce the incidence of hereditary diseases in animal populations.

Additionally, the preservation of genetic diversity and the conservation of rare and endangered breeds have become increasingly important considerations in animal breeding and conservation efforts. As stakeholders recognize the value of genetic diversity in maintaining the health and resilience of animal populations, there is a growing demand for reproductive technologies that facilitate genetic preservation and diversity management. Techniques such as sperm and oocyte cryopreservation, embryo banking, and assisted reproductive procedures enable breeders to safeguard valuable genetic resources, prevent the loss of genetic diversity, and contribute to the long-term sustainability of animal agriculture and biodiversity conservation.

Key Market Challenges

Regulatory Hurdles and Compliance Requirements

One of the primary challenges facing the veterinary assistive reproduction technology market is navigating regulatory hurdles and compliance requirements. Different countries have varying regulations governing the use of reproductive technologies in animals, including licensing, safety standards, and ethical considerations. The complex regulatory landscape can create barriers to market entry for manufacturers and service providers, leading to delays in product approvals and increased compliance costs. Moreover, inconsistencies in regulatory frameworks across regions can hinder international trade and collaboration, limiting market growth opportunities.

Ethical Concerns and Animal Welfare

Ethical concerns surrounding the use of reproductive technologies in animals present significant challenges to the veterinary assistive reproduction technology market. Some stakeholders raise ethical objections to certain assisted reproductive procedures, citing concerns about animal welfare, genetic manipulation, and the commodification of living organisms. Issues such as embryo manipulation, surrogate pregnancy, and the use of genetically modified organisms (GMOs) in breeding programs can provoke public debate and regulatory scrutiny, potentially affecting market acceptance and adoption. Addressing ethical considerations and ensuring the welfare of animals involved in reproductive procedures are essential for fostering trust and acceptance among consumers and stakeholders.

High Cost of Advanced Reproductive Procedures

The high cost associated with advanced reproductive procedures poses a significant challenge to the widespread adoption of veterinary assistive reproduction technology. Techniques such as in vitro fertilization, embryo transfer, and genetic screening require specialized equipment, facilities, and expertise, making them costly to implement and maintain. Additionally, factors such as the need for skilled personnel, laboratory supplies, and quality control measures further contribute to the overall expense of assisted reproductive services. For animal breeders, producers, and pet owners, the prohibitive cost of advanced reproductive procedures can act as a barrier to accessing these technologies, limiting market growth and adoption rates.

Key Market Trends

Integration of Artificial Intelligence and Big Data Analytics

One of the key ways in which AI and big data analytics are driving market growth is through the optimization of breeding outcomes and reproductive efficiency. By analyzing large datasets of genetic, physiological, and environmental factors, AI algorithms and machine learning techniques can identify trends, patterns, and correlations that may not be apparent to human observers. This enables veterinarians and breeders to make more informed breeding decisions, predict reproductive performance, and optimize breeding strategies to improve animal health and productivity.

Moreover, AI and big data analytics are revolutionizing the field of reproductive genetics by enabling the identification of genetic markers associated with desirable traits. Through techniques such as genomic selection (GS) and marker-assisted selection (MAS), breeders can prioritize animals with favorable genetic profiles and accelerate genetic improvement programs. This not only enhances the overall genetic quality of animal populations but also helps to reduce the incidence of hereditary diseases and improve the resilience of livestock and companion animals.

Furthermore, the integration of AI and big data analytics is driving innovation in assisted reproductive technologies, such as in vitro fertilization (IVF), embryo transfer, and sperm and oocyte cryopreservation. By analyzing vast amounts of reproductive data, AI algorithms can optimize the timing and conditions of assisted reproductive procedures to maximize success rates and minimize costs. This has the potential to revolutionize the delivery of reproductive services and make advanced reproductive technologies

more accessible and affordable to a wider range of breeders, producers, and pet owners.

Additionally, AI and big data analytics are enabling the development of predictive models for reproductive management, disease detection, and fertility forecasting. By analyzing historical data and real-time inputs, AI algorithms can predict reproductive outcomes, identify potential health issues, and recommend preventive measures to mitigate risks. This proactive approach to reproductive management not only improves animal welfare but also helps to optimize resource allocation and minimize economic losses for animal producers and breeders.

Adoption of Precision Breeding Techniques

The adoption of precision breeding techniques is playing a pivotal role in driving the growth of the global veterinary assistive reproduction technology market. Precision breeding encompasses a range of advanced reproductive technologies and genetic management strategies aimed at achieving specific breeding objectives with unprecedented accuracy and efficiency. This trend is revolutionizing the field of veterinary reproductive medicine and offering new opportunities for improving animal health, productivity, and genetic diversity.

Precision breeding techniques leverage advancements in genomics, molecular biology, and assisted reproductive technologies to select animals with desirable traits and optimize breeding outcomes. Through techniques such as marker-assisted selection (MAS) and genomic selection (GS), breeders can identify and prioritize genetic markers associated with traits of interest, such as disease resistance, productivity, and temperament. By incorporating genetic information into breeding decisions, breeders can accelerate genetic improvement programs, reduce the incidence of hereditary diseases, and enhance the overall genetic quality of animal populations.

One of the key drivers behind the adoption of precision breeding techniques is the increasing demand for high-quality livestock and companion animals. With rising global populations and changing consumer preferences, there is growing pressure on animal producers and breeders to improve the efficiency and sustainability of animal production systems. Precision breeding offers a powerful tool for meeting these demands by enabling breeders to produce animals with superior traits more efficiently than traditional breeding methods.

Moreover, precision breeding techniques are also driving innovation and growth in the

veterinary reproductive technology market by facilitating the development of customized reproductive solutions tailored to specific breeding objectives and challenges. Service providers are offering a wide range of personalized reproductive services, including genetic counseling, embryo selection, and customized breeding programs, to meet the unique needs of individual breeders, producers, and pet owners. This trend is enhancing customer satisfaction and driving demand for specialized reproductive services in the veterinary market.

Segmental Insights

Animal Type Insights

Based on the animal type, bovine segment emerged as the dominant segment in the global veterinary assistive reproduction technology market in 2023. The bovine industry represents a significant portion of the global agricultural economy, with dairy and beef production being major contributors to food supply chains worldwide. As such, there is a pressing need within the bovine sector for efficient reproductive technologies to optimize breeding outcomes, genetic diversity, and overall productivity. Veterinary assistive reproduction technologies offer solutions to address challenges such as low fertility rates, genetic disorders, and the need for genetic improvement programs.

Conception Method Insights

Based on the conception method, artificial insemination segment emerged as the dominant segment in the global veterinary assistive reproduction technology market in 2023. Advancements in AI technologies and techniques have expanded its applicability and efficacy in different animal species, including cattle, pigs, sheep, horses, and companion animals. Improved semen collection, processing, and storage methods, coupled with the development of synchronized estrus protocols and reproductive hormone treatments, have enhanced the success rates of AI procedures and widened its adoption in diverse breeding programs.

Regional Insights

North America emerged as the dominant player in the global veterinary assistive reproduction technology market in 2023, holding the largest market share. North America boasts a highly developed veterinary healthcare infrastructure and a strong research and development ecosystem, which have fostered innovation and adoption of advanced reproductive technologies in the region. Veterinary clinics, research

institutions, and biotechnology companies in North America have been at the forefront of developing and commercializing cutting-edge reproductive solutions for various animal species.

Key Market Players

Genus Plc

URUS Group LP

CRV

SEMEX

Select Sires, Inc.

Swine Genetics International

National Dairy Development Board

STgenetics

VikingGenetics

Geno SA

Report Scope:

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

Global Veterinary Assistive Reproduction Technology Market, By Product:

Normal Semen

Sexed Semen

Global Veterinary Assistive Reproduction Technology Market, By Animal Type:

Bovine

Swine

Ovine

Caprine

Equine

Other Animals

Global Veterinary Assistive Reproduction Technology Market, By Conception Method:

Artificial Insemination

Embryo transfer (MOET)

IVF

Global Veterinary Assistive Reproduction Technology Market, By Distribution Channel:

Private

Public

Global Veterinary Assistive Reproduction Technology 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

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Veterinary Assistive Reproduction Technology Market.

Available Customizations:

Global Veterinary Assistive Reproduction Technology 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).

Contents

1. Product Overview
 - 1.1. Market Definition
 - 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMERS

5. GLOBAL VETERINARY ASSISTIVE REPRODUCTION TECHNOLOGY MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product (Normal Semen, Sexed Semen)
 - 5.2.2. By Animal Type (Bovine, Swine, Ovine, Caprine, Equine, Other Animals)
 - 5.2.3. By Conception Method (Artificial Insemination, Embryo transfer (MOET), IVF)
 - 5.2.4. By Distribution Channel (Private, Public)

- 5.2.5. By Region
- 5.2.6. By Company (2023)
- 5.3. Market Map
 - 5.3.1. By Product
 - 5.3.2. By Animal Type
 - 5.3.3. By Conception Method
 - 5.3.4. By Distribution Channel
 - 5.3.5. By Region

6. ASIA PACIFIC VETERINARY ASSISTIVE REPRODUCTION TECHNOLOGY MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Product
 - 6.2.2. By Animal Type
 - 6.2.3. By Conception Method
 - 6.2.4. By Distribution Channel
 - 6.2.5. By Country
- 6.3. Asia Pacific: Country Analysis
 - 6.3.1. China Veterinary Assistive Reproduction Technology Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Product
 - 6.3.1.2.2. By Animal Type
 - 6.3.1.2.3. By Conception Method
 - 6.3.1.2.4. By Distribution Channel
 - 6.3.2. India Veterinary Assistive Reproduction Technology Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Product
 - 6.3.2.2.2. By Animal Type
 - 6.3.2.2.3. By Conception Method
 - 6.3.2.2.4. By Distribution Channel
 - 6.3.3. Australia Veterinary Assistive Reproduction Technology Market Outlook
 - 6.3.3.1. Market Size & Forecast

- 6.3.3.1.1. By Value
- 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Product
 - 6.3.3.2.2. By Animal Type
 - 6.3.3.2.3. By Conception Method
 - 6.3.3.2.4. By Distribution Channel
- 6.3.4. Japan Veterinary Assistive Reproduction Technology Market Outlook
 - 6.3.4.1. Market Size & Forecast
 - 6.3.4.1.1. By Value
 - 6.3.4.2. Market Share & Forecast
 - 6.3.4.2.1. By Product
 - 6.3.4.2.2. By Animal Type
 - 6.3.4.2.3. By Conception Method
 - 6.3.4.2.4. By Distribution Channel
- 6.3.5. South Korea Veterinary Assistive Reproduction Technology Market Outlook
 - 6.3.5.1. Market Size & Forecast
 - 6.3.5.1.1. By Value
 - 6.3.5.2. Market Share & Forecast
 - 6.3.5.2.1. By Product
 - 6.3.5.2.2. By Animal Type
 - 6.3.5.2.3. By Conception Method
 - 6.3.5.2.4. By Distribution Channel

7. EUROPE VETERINARY ASSISTIVE REPRODUCTION TECHNOLOGY MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Product
 - 7.2.2. By Animal Type
 - 7.2.3. By Conception Method
 - 7.2.4. By Distribution Channel
 - 7.2.5. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. France Veterinary Assistive Reproduction Technology Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast

- 7.3.1.2.1. By Product
- 7.3.1.2.2. By Animal Type
- 7.3.1.2.3. By Conception Method
- 7.3.1.2.4. By Distribution Channel
- 7.3.2. Germany Veterinary Assistive Reproduction Technology Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Product
 - 7.3.2.2.2. By Animal Type
 - 7.3.2.2.3. By Conception Method
 - 7.3.2.2.4. By Distribution Channel
- 7.3.3. Spain Veterinary Assistive Reproduction Technology Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Product
 - 7.3.3.2.2. By Animal Type
 - 7.3.3.2.3. By Conception Method
 - 7.3.3.2.4. By Distribution Channel
- 7.3.4. Italy Veterinary Assistive Reproduction Technology Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Product
 - 7.3.4.2.2. By Animal Type
 - 7.3.4.2.3. By Conception Method
 - 7.3.4.2.4. By Distribution Channel
- 7.3.5. United Kingdom Veterinary Assistive Reproduction Technology Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Product
 - 7.3.5.2.2. By Animal Type
 - 7.3.5.2.3. By Conception Method
 - 7.3.5.2.4. By Distribution Channel

8. NORTH AMERICA VETERINARY ASSISTIVE REPRODUCTION TECHNOLOGY MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Product

8.2.2. By Animal Type

8.2.3. By Conception Method

8.2.4. By Distribution Channel

8.2.5. By Country

8.3. North America: Country Analysis

8.3.1. United States Veterinary Assistive Reproduction Technology Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Product

8.3.1.2.2. By Animal Type

8.3.1.2.3. By Conception Method

8.3.1.2.4. By Distribution Channel

8.3.2. Mexico Veterinary Assistive Reproduction Technology Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Product

8.3.2.2.2. By Animal Type

8.3.2.2.3. By Conception Method

8.3.2.2.4. By Distribution Channel

8.3.3. Canada Veterinary Assistive Reproduction Technology Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Product

8.3.3.2.2. By Animal Type

8.3.3.2.3. By Conception Method

8.3.3.2.4. By Distribution Channel

9. SOUTH AMERICA VETERINARY ASSISTIVE REPRODUCTION TECHNOLOGY MARKET OUTLOOK

9.1. Market Size & Forecast

- 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Product
 - 9.2.2. By Animal Type
 - 9.2.3. By Conception Method
 - 9.2.4. By Distribution Channel
 - 9.2.5. By Country
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil Veterinary Assistive Reproduction Technology Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Product
 - 9.3.1.2.2. By Animal Type
 - 9.3.1.2.3. By Conception Method
 - 9.3.1.2.4. By Distribution Channel
 - 9.3.2. Argentina Veterinary Assistive Reproduction Technology Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Product
 - 9.3.2.2.2. By Animal Type
 - 9.3.2.2.3. By Conception Method
 - 9.3.2.2.4. By Distribution Channel
 - 9.3.3. Colombia Veterinary Assistive Reproduction Technology Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Product
 - 9.3.3.2.2. By Animal Type
 - 9.3.3.2.3. By Conception Method
 - 9.3.3.2.4. By Distribution Channel

10. MIDDLE EAST AND AFRICA VETERINARY ASSISTIVE REPRODUCTION TECHNOLOGY MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast

- 10.2.1. By Product
- 10.2.2. By Animal Type
- 10.2.3. By Conception Method
- 10.2.4. By Distribution Channel
- 10.2.5. By Country
- 10.3. MEA: Country Analysis
 - 10.3.1. South Africa Veterinary Assistive Reproduction Technology Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Product
 - 10.3.1.2.2. By Animal Type
 - 10.3.1.2.3. By Conception Method
 - 10.3.1.2.4. By Distribution Channel
 - 10.3.2. Saudi Arabia Veterinary Assistive Reproduction Technology Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Product
 - 10.3.2.2.2. By Animal Type
 - 10.3.2.2.3. By Conception Method
 - 10.3.2.2.4. By Distribution Channel
 - 10.3.3. UAE Veterinary Assistive Reproduction Technology Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Product
 - 10.3.3.2.2. By Animal Type
 - 10.3.3.2.3. By Conception Method
 - 10.3.3.2.4. By Distribution Channel
 - 10.3.4. Egypt Veterinary Assistive Reproduction Technology Market Outlook
 - 10.3.4.1. Market Size & Forecast
 - 10.3.4.1.1. By Value
 - 10.3.4.2. Market Share & Forecast
 - 10.3.4.2.1. By Product
 - 10.3.4.2.2. By Animal Type
 - 10.3.4.2.3. By Conception Method
 - 10.3.4.2.4. By Distribution Channel

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Recent Developments
- 12.2. Product Launches (If Any)
- 12.3. Mergers & Acquisitions (If Any)

13. GLOBAL VETERINARY ASSISTIVE REPRODUCTION TECHNOLOGY MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Product

15. COMPETITIVE LANDSCAPE

- 15.1. Genus Plc
 - 15.1.1. Business overview
 - 15.1.2. Company Snapshot
 - 15.1.3. Products & Services
 - 15.1.4. Financials (As Reported)
 - 15.1.5. Recent Developments
 - 15.1.6. Key Personnel Details
 - 15.1.7. SWOT Analysis
- 15.2. URUS Group LP
- 15.3. CRV
- 15.4. SEMEX
- 15.5. Select Sires, Inc.
- 15.6. Swine Genetics International
- 15.7. National Dairy Development Board
- 15.8. STgenetics

15.9. VikingGenetics

15.10. Geno SA

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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