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Veterinary Biomarkers Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Animal Type (Companion Animals (Dogs, Cats, Others), Production Animals (Cows, Pigs, Others)), By Product Type (Biomarkers, Kits & Reagents, Biomarker Readers), By Application (Disease Diagnostics, Preclinical Research, Others), By Disease Type (Inflammatory & Infectious Diseases, Cardiovascular Diseases, Skeletal Muscle Diseases, Tumor, Others), By Region, By Competition Forecast & Opportunities, 2018-2028F

https://marketpublishers.com/r/V50CF8C10C76EN.html
Date: October 2023
Pages: 190
Price: US$ 4,900.00 (Single User License)
ID: V50CF8C10C76EN

Abstracts

Global Veterinary Biomarkers Market has valued at USD 760.12 million in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 12.33% through 2028. The Global Veterinary Biomarkers Market refers to the sector within the veterinary healthcare industry that deals with the use of biomarkers for diagnosing diseases, monitoring animal health, and assessing treatment efficacy in animals. Biomarkers are measurable indicators, such as proteins, genes, or metabolites, that can be used to detect and quantify various physiological and pathological processes in animals.

Key Market Drivers

Increasing Prevalence of Animal Diseases

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The Global Veterinary Biomarkers Market has witnessed significant growth in recent years, owing in part to a concerning trend: the increasing prevalence of animal diseases. As our understanding of animal health deepens and the bond between humans and their animal companions grows stronger, the demand for innovative solutions to diagnose, treat, and prevent diseases in animals has surged. The animal kingdom, whether it includes companion animals or livestock, is facing a mounting threat from various diseases. Infectious diseases, cancers, metabolic disorders, and age-related illnesses are on the rise among animals. This surge in disease incidence presents a critical challenge to veterinarians, pet owners, and livestock producers alike. The key to effective disease management in animals often lies in early detection and timely intervention. Veterinary biomarkers, which are measurable biological indicators, offer a potent solution. These biomarkers can be identified in blood, urine, tissues, or other bodily fluids and can provide crucial information about an animal's health status, helping veterinarians diagnose diseases in their early stages. Veterinary biomarkers have revolutionized disease diagnosis in animals. They enable veterinarians to go beyond traditional clinical observations and provide more accurate and objective assessments. This, in turn, leads to better-informed treatment decisions, which can significantly improve the prognosis for sick animals. Just as in human healthcare, personalized medicine is gaining traction in veterinary care. Biomarkers allow veterinarians to tailor treatment plans to individual animals' unique needs. This personalization enhances the effectiveness of therapies while minimizing adverse effects, leading to better patient outcomes. Biomarkers also play a vital role in disease surveillance and epidemiological studies. By tracking changes in biomarker profiles within animal populations, researchers can monitor the spread of diseases, identify potential outbreaks, and implement preventive measures more efficiently. In the livestock industry, biomarkers are essential for maintaining herd and flock health. Timely detection of diseases can prevent entire populations from being affected, minimizing economic losses for farmers. Biomarkers are indispensable tools for ensuring food security and sustainable livestock production. The spillover of diseases from animals to humans, known as zoonotic diseases, has gained significant attention in recent years. As the prevalence of such diseases rises, so does the need for effective monitoring and control. Veterinary biomarkers are invaluable for studying zoonotic diseases and preventing their transmission.

Personalized Veterinary Care

The Global Veterinary Biomarkers Market is experiencing remarkable growth, driven by a powerful trend that mirrors advance in human medicine: personalized veterinary care. As the bond between humans and their animal companions deepens, there is an

increasing demand for tailored healthcare solutions that take into account the unique needs of individual animals. This demand is propelling the growth of the veterinary biomarkers market. Veterinary medicine has come a long way from a one-size-fits-all approach. Today, veterinarians and pet owners alike recognize that each animal is unique, with distinct genetic makeup, environmental factors, and health histories. Personalized veterinary care acknowledges these differences and seeks to provide tailored treatment plans for each patient. At the heart of personalized veterinary care are biomarkers—measurable indicators found in bodily fluids, tissues, or other biological materials. These biomarkers provide valuable insights into an animal's health, from identifying genetic predispositions to tracking disease progression. Veterinary biomarkers help veterinarians make more informed decisions about diagnostics, treatment strategies, and preventive measures. One of the key benefits of personalized veterinary care is early disease detection. Biomarkers allow veterinarians to identify disease markers long before clinical symptoms manifest. This early detection provides a crucial window of opportunity for timely intervention and treatment, potentially improving patient outcomes and reducing the cost of healthcare. Biomarkers also enable veterinarians to create personalized treatment plans. By analyzing an animal's unique biomarker profile, veterinarians can choose the most suitable medications, therapies, and dietary recommendations. This tailored approach optimizes treatment effectiveness while minimizing potential side effects. For animals with chronic conditions such as diabetes, arthritis, or kidney disease, biomarkers allow for ongoing monitoring. Veterinarians can track biomarker levels to assess the progression of the disease and adjust treatment plans accordingly. This proactive approach enhances the animal's quality of life. Genetic biomarkers are instrumental in assessing an animal's predisposition to certain diseases. Genetic testing can reveal susceptibility to conditions like cancer or hereditary disorders. Armed with this information, veterinarians can implement preventive measures and early screening.

Companion Animal Ownership Trends

Companion animals, including dogs, cats, birds, and small mammals, have long held a special place in our hearts and homes. Recent years have witnessed a remarkable surge in companion animal ownership trends worldwide. This growing bond between humans and their pets has not only enriched our lives but is also driving the growth of the Global Veterinary Biomarkers Market. Companion animals are no longer just pets; they are integral members of families. The modern trend toward pet humanization has elevated the status of pets from mere animals to cherished companions. This shift has significantly increased the emphasis on pet health and well-being. With the increasing humanization of pets, pet owners are more aware than ever of the health needs of their

animal companions. They are willing to invest in preventive healthcare, regular check-ups, and advanced diagnostics to ensure their pets lead healthy and happy lives. Veterinary biomarkers have emerged as indispensable tools in the early detection of diseases in companion animals. These measurable indicators found in blood, urine, or tissues can identify potential health issues before they manifest clinical symptoms. Early detection can be a game-changer in treating diseases effectively and improving the overall prognosis. Just like humans, companion animals experience age-related health concerns. Conditions such as arthritis, diabetes, and heart disease become more prevalent in older pets. Biomarkers play a vital role in monitoring these conditions, allowing for timely interventions and personalized treatment plans. The trend of personalized medicine is not limited to human healthcare. In veterinary medicine, biomarkers enable veterinarians to tailor healthcare plans to the specific needs of individual pets. This personalized approach optimizes treatment outcomes while minimizing adverse effects. Cancer is a significant concern in companion animals, and early detection is key to successful treatment. Biomarkers are instrumental in identifying cancer markers, allowing for prompt diagnosis and the development of targeted treatment strategies. Genetic biomarkers are critical for assessing an animal's predisposition to certain hereditary diseases. Genetic testing can provide valuable insights into potential health risks, allowing pet owners to take preventive actions or early screening measures.

Livestock Farming Efficiency

The Global Veterinary Biomarkers Market is experiencing remarkable growth, driven by a powerful force that impacts food security and agricultural sustainability: livestock farming efficiency. As the global population continues to grow, the demand for animal-based products like meat, dairy, and eggs is rising exponentially. To meet this demand, farmers and ranchers are embracing innovations that improve livestock health and productivity. This, in turn, is fueling the growth of the veterinary biomarkers market. With the global population projected to reach 9 billion by 2050, the agriculture industry faces the daunting task of producing more food while minimizing the environmental impact. Livestock farming plays a critical role in this challenge, as it provides a significant source of protein for human consumption. Efficient livestock farming relies on healthy animals that grow and reproduce effectively. Biomarkers are at the forefront of efforts to optimize livestock health. These measurable indicators in blood, urine, or tissues help farmers and veterinarians monitor the well-being of animals, detect diseases early, and ensure timely interventions. Disease outbreaks can have devastating consequences for livestock farms, leading to economic losses and food shortages. Biomarkers enable the early detection of diseases, facilitating prompt treatment and the isolation of affected

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animals, thereby preventing the spread of infections. Reproductive efficiency is critical in livestock farming. Biomarkers can help identify animals that are in optimal breeding condition, increasing the chances of successful pregnancies and reducing the time and resources required for reproduction. Biomarkers also play a role in assessing the nutritional status of livestock. By tracking biomarker levels, farmers can adjust feed and nutrition plans to ensure that animals receive the right nutrients for healthy growth. The livestock industry has been under scrutiny for the overuse of antibiotics, leading to concerns about antibiotic resistance. Biomarkers can aid in identifying the specific pathogens causing illnesses, enabling targeted treatments and reducing the need for broad-spectrum antibiotics. Healthy livestock produces higher-quality meat, milk, and eggs. Biomarker-based monitoring and interventions can result in improved product quality, which benefits both producers and consumers.

Key Market Challenges

Validation and Standardization

Validating and standardizing biomarker assays for veterinary use is essential for ensuring accuracy and reliability. Establishing consistent standards and methodologies is challenging due to the diversity of animal species, breeds, and health conditions. This lack of standardization can hinder the widespread adoption of biomarker-based diagnostics and treatments.

Cost Constraints

Cost is a significant barrier to the adoption of biomarker-based diagnostics and treatments, particularly in resource-limited settings. Developing biomarker assays and acquiring the necessary equipment can be expensive. Reducing costs while maintaining quality is an ongoing challenge for market players.

Education and Awareness

Many veterinarians and pet owners may not be fully aware of the benefits of biomarker-based diagnostics and personalized veterinary care. Education and awareness campaigns are essential to inform stakeholders about the advantages of biomarkers in early disease detection, treatment optimization, and preventive care.

Data Privacy and Security

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Biomarker-based diagnostics generate a wealth of sensitive data, including genetic information. Ensuring the privacy and security of this data is crucial to gaining the trust of pet owners and maintaining ethical standards. Compliance with data protection regulations poses an additional challenge for market players.

Key Market Trends

Rise of Point-of-Care Diagnostics

Point-of-care diagnostics are revolutionizing veterinary medicine by providing rapid and on-site testing capabilities. These portable and user-friendly devices allow veterinarians to perform biomarker-based tests right in the clinic, enabling quicker diagnoses and immediate treatment decisions. The convenience of point-of-care testing is expected to drive its adoption in veterinary practices.

Advancements in Genomic Biomarkers

Genomic biomarkers, which involve the study of an animal's genetic material, are gaining prominence in veterinary medicine. These biomarkers provide insights into an animal's predisposition to diseases, helping veterinarians tailor preventive measures and early screening based on genetic risk factors.

Microbiome and Metabolomics Biomarkers

Research into the microbiome and metabolomics is expanding our understanding of how gut health and metabolism influence overall animal well-being. Biomarkers associated with the microbiome and metabolomics are expected to play a more significant role in disease diagnosis and dietary recommendations for animals.

Immunotherapy and Targeted Treatments

Immunotherapy and targeted treatments are emerging as powerful tools in veterinary medicine. Biomarkers play a crucial role in identifying suitable candidates for these therapies and monitoring treatment responses. Expect to see more biomarker-driven personalized treatment plans for animals with cancer and immune-related disorders.

Segmental Insights

Animal Type Insights

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Based on the category of Animal Type, companion animals segment held the largest share in 2022. This dominance can be attributed to the increasing adoption rates of dogs and the notable prevalence of diseases among them. Data from the American Kennel Club (AKC) revealed a rise in U.S. households owning dogs, increasing from 50% in 2018 to 54% in 2021. Furthermore, according to the 2022 FEDIAF European Pet Food Industry report, 46% of households in Europe, totaling 90 million, owned pets, and the dog population in the region was estimated to be 92.9 million in 2021. Additionally, the COVID-19 pandemic prompted many individuals worldwide to adopt dogs for emotional support.

In 2022, the production animal segment also experienced substantial growth and held a significant share based on animal type. This growth is attributed to the expanding population of production animals like cattle and other livestock, particularly in developing countries such as China, India, and Japan. For instance, data from the national dairy development board indicated that the cattle population in India increased from 185 million in 2003 to 193 million in 2019. Similarly, the total bovine population grew from 283 million in 2003 to 302 million in 2019. Additionally, the rising prevalence of severe infectious diseases like tuberculosis among production animals has raised concerns, driving the adoption of various diagnostic methods.

Product Type Insights

In 2022, the product category of biomarkers, kits, and reagents dominated the market share, primarily due to the extensive availability of well-known biomarker brands and test kits introduced by leading industry players. Veterinarians show a preference for biomarker test kits because they offer precise and sensitive disease diagnostic methods. These kits play a crucial role in comprehending the progression of illnesses and delivering accurate treatments that target the specific biological indicators of the disease. Furthermore, there has been a growing awareness of the applications of biomarkers in the veterinary field, particularly in developing nations, which has contributed to the market's recent growth.

Looking ahead, biomarker readers are expected to maintain a significant market share in the foreseeable future, driven by the increasing rate of diagnosis in veterinary practices. Unlike human biomarker readers, which lack accuracy and calibration for animal readings, key industry players have introduced dedicated veterinary biomarker readers. For instance, Virbac launched an intuitive and compact laser-based fluorescent reader known as the 'speed reader,' designed to precisely measure biomarker

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concentrations in animal serum or plasma samples. This development is a key driver behind the segment's growth within the market.

Regional Insights

In 2022, North America emerged as the dominant region in the veterinary biomarkers market, boasting the highest market share. This significant share can be attributed to several factors, including the substantial presence of key industry players, the implementation of various strategic initiatives by these companies to expand their market reach, an upsurge in research activities, an increase in diagnostic rates, and a rising population of animals, accompanied by increased veterinary care spending. The proliferation of veterinary clinics staffed with licensed and well-trained veterinarians in these countries is also contributing to the market's growth. For instance, as of 2020, the United States alone had approximately 118,624 licensed veterinarians, predominantly focused on companion animal patients, according to data from the AVMA.

In the European region, which holds the second-largest market share, the presence of major key players like Virbac and ACUVET BIOTECH in European countries is a significant driving force.

Meanwhile, the Asia Pacific region is expected to witness rapid growth, with a projected CAGR in the coming years. This growth can be attributed to increased expenditure on animal healthcare and rising disposable income in key markets, coupled with a growing awareness of the significance of biomarkers in veterinary practices. The escalating demand for timely and accurate disease diagnosis, as well as the trend of pet humanization observed in developing countries like India, are additional factors propelling market expansion in this region.

Key Market Players

Zoetis Inc.

Virbac SA

Life Diagnostics Inc

Acuvet Biotech

Merck & Co., Inc.

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IDEXX Laboratories, Inc.

Mercodia AB

Antech Diagnostics Inc

Report Scope:

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

Veterinary Biomarkers Market, By Animal Type:

Companion Animals

Dogs

Cats

Others

Production Animals

Cows

Pigs

Others

Veterinary Biomarkers Market, By Product Type:

Biomarkers

Kits & Reagents

Biomarker Readers

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Veterinary Biomarkers Market, By Application:

Disease Diagnostics

Preclinical Research

Others

Veterinary Biomarkers Market, By Disease Type:

Inflammatory & Infectious Diseases

Cardiovascular Diseases

Skeletal Muscle Diseases

Tumor

Others

Veterinary Biomarkers Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

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Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Veterinary Biomarkers Market.

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Available Customizations:

Global Veterinary Biomarkers 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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