

Veterinary Chemistry Analyzer Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Benchtop, Portable), By Product (Consumables, Instruments), By Species (Cattle, Canine, Feline, Caprine, Equine, Ovine, Porcine, Avian, Others), By Application (Blood Chemistry Analysis, Urinalysis, Blood Gas & Electrolyte Analysis, Glucose Monitoring), By End-use (Veterinary Laboratories, Veterinary Hospitals and Clinics, Point-Of-Care Testing, Others), By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

Global Veterinary Chemistry Analyzer Market has valued at USD 2.33 billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 12.04% through 2028. The global veterinary chemistry analyzer market refers to the industry segment dedicated to the production and distribution of analytical instruments used in veterinary medicine. These analyzers are designed to perform a wide range of biochemical and hematological tests on animal samples, aiding veterinarians in diagnosing and monitoring the health of various animal species.

Key Market Drivers

Increasing Pet Ownership

The global veterinary chemistry analyzer market is on an upward trajectory, and one of

the driving forces behind this growth is the worldwide surge in pet ownership. As more people embrace the companionship of pets, they are also recognizing the importance of ensuring the health and well-being of their furry friends. Perhaps the most obvious way in which increasing pet ownership fuels the veterinary chemistry analyzer market is through the sheer growth in the pet population. Dogs, cats, rabbits, birds, and exotic animals are becoming integral members of households around the world. The larger the pet population, the greater the demand for veterinary care, including diagnostic services provided by chemistry analyzers. With the rise in pet ownership comes a heightened awareness of pet health. Pet owners are increasingly viewing their animals not just as pets but as family members, leading to a shift in mindset. This shift has translated into greater investment in the health and well-being of pets, including routine check-ups, vaccinations, and diagnostic tests. Veterinary chemistry analyzers play a crucial role in this context by providing rapid and accurate diagnostic results. Increasing pet ownership has also led to a shift in healthcare approaches for pets. Rather than waiting until a pet becomes visibly ill, many owners are embracing preventive healthcare. This proactive approach involves regular check-ups and screening tests to detect health issues early. Veterinary chemistry analyzers are indispensable tools in this regard, allowing veterinarians to identify and address potential health concerns before they become serious. As pet ownership grows, so does the demand for professional veterinary care. The veterinary industry has witnessed significant expansion to meet this demand, with more clinics, hospitals, and specialized facilities opening up. These veterinary establishments often invest in advanced diagnostic equipment, including chemistry analyzers, to provide comprehensive and timely healthcare services to pets. The veterinary chemistry analyzer market has experienced notable technological advancements. Modern analyzers are not only more accurate but also more user-friendly. They can perform a wide range of tests with smaller sample volumes, making them efficient tools for veterinarians. The integration of advanced technologies, such as cloud connectivity and electronic health records, further enhances their utility. While North America and Europe have traditionally been strong markets for veterinary chemistry analyzers, the trend of increasing pet ownership is also extending to emerging markets in Asia-Pacific, Latin America, and Africa. As economies grow and urbanize, the adoption of pets as companions is rising. This, in turn, is driving the demand for advanced veterinary diagnostic tools in these regions.

Pet Humanization

In recent years, the phenomenon of pet humanization has been reshaping the way people view and care for their animal companions. As pets increasingly become integral members of the family, pet owners are investing more in their health and well-being.

This shift in attitude toward pets is not only changing how we care for them but is also significantly boosting the growth of the global veterinary chemistry analyzer market. Pet humanization refers to the practice of treating pets with the same care, attention, and affection as one would a family member. Pets are no longer seen as mere animals but as cherished companions who bring joy and comfort to our lives. This shift in perception has elevated the importance of providing high-quality healthcare to pets, including regular check-ups and advanced diagnostic services. As pets are embraced as members of the family, pet owners are increasingly willing to invest in their health and well-being. This includes routine visits to veterinarians for preventive care, vaccinations, and diagnostic tests. Veterinary chemistry analyzers play a crucial role in this regard, offering a wide range of diagnostic capabilities to assess a pet's overall health, detect diseases, and monitor chronic conditions. Pet humanization has led to a more proactive approach to pet healthcare. Rather than waiting for pets to exhibit symptoms of illness, many owners opt for regular health check-ups and screening tests. Chemistry analyzers enable veterinarians to conduct a battery of tests quickly and efficiently, helping to identify health issues at an early stage and take preventive measures. Pet owners who view their animals as family members have high expectations for the quality of healthcare provided to their pets. They seek accurate and comprehensive diagnostic information to ensure the well-being of their furry companions. Veterinary chemistry analyzers are designed to meet these expectations by delivering precise results across a wide range of tests, including blood chemistry and urine analysis. The growth of the global veterinary chemistry analyzer market is also driven by advancements in veterinary medicine. These analyzers have become essential tools for modern veterinarians, enabling them to provide cutting-edge healthcare services. With ongoing research and development efforts, chemistry analyzers continue to evolve, offering improved accuracy, ease of use, and integration with electronic health records. The increase in pet humanization has led to a significant growth in the pet population worldwide. More families are adopting pets, and this larger pet population directly correlates with a higher demand for veterinary services, including diagnostic tests performed using chemistry analyzers.

Expanding Veterinary Services

The global veterinary chemistry analyzer market is witnessing significant growth, driven in part by the expansion of veterinary services around the world. As the pet population continues to grow and as pet owners increasingly prioritize the health and well-being of their animal companions, the demand for advanced diagnostic tools, such as veterinary chemistry analyzers, has surged. One of the primary drivers behind the expansion of veterinary services is the remarkable growth in the pet population. As more families

welcome pets into their homes, the need for comprehensive veterinary care becomes evident. This includes routine check-ups, vaccinations, and diagnostic tests. Veterinary chemistry analyzers play a crucial role in this context by providing veterinarians with the tools to perform essential diagnostic procedures efficiently. With the expansion of veterinary services comes a heightened commitment to providing the best possible care for animals. Veterinary clinics, hospitals, and specialized facilities are investing in state-of-the-art equipment, including chemistry analyzers, to offer a wide range of diagnostic tests. These analyzers enable veterinarians to diagnose and monitor various health conditions with accuracy and speed, resulting in improved treatment outcomes. The expansion of veterinary services has also promoted a shift toward preventive healthcare for pets. Pet owners are increasingly seeking regular check-ups and screening tests to detect potential health issues before they become critical. Veterinary chemistry analyzers are instrumental in this regard, allowing for comprehensive blood chemistry and urine analysis that can identify underlying health concerns at an early stage. As veterinary services expand, so do the specializations within the field. Veterinarians now focus on specific areas of expertise, such as cardiology, oncology, and dermatology, among others. These specialized practitioners rely on sophisticated diagnostic equipment, including chemistry analyzers, to provide accurate assessments and personalized treatment plans for pets with unique healthcare needs. The global veterinary chemistry analyzer market has experienced significant technological advancements in recent years. Modern analyzers are more user-friendly, offer a broader range of tests, and can process samples with greater efficiency. Integration with electronic health records and cloud-based systems has also streamlined data management, making diagnostic processes smoother and more effective.

Awareness and Education

The global veterinary chemistry analyzer market is experiencing remarkable growth, driven by several key factors. Among them, the growing awareness and education about pet health and the role of diagnostic tools such as veterinary chemistry analyzers are proving to be pivotal. As pet owners become more informed and proactive in caring for their animal companions, the demand for advanced veterinary diagnostics has surged. Awareness and education efforts are empowering pet owners with knowledge about the importance of regular check-ups and diagnostic tests for their beloved animals. Pet owners are increasingly realizing that preventive healthcare is crucial for their pets, much like it is for humans. This shift in mindset drives the demand for veterinary chemistry analyzers, which play a vital role in early disease detection and overall health monitoring. Veterinarians are essential ambassadors for spreading awareness about the significance of diagnostic tools in pet healthcare. Through

consultations and educational initiatives, they inform pet owners about the capabilities of veterinary chemistry analyzers in diagnosing a wide range of conditions, from organ dysfunction to infections. Veterinarians also emphasize the benefits of early intervention and tailored treatment plans based on accurate test results. Awareness campaigns often emphasize the comprehensive diagnostic capabilities of chemistry analyzers. These analyzers can perform a battery of tests, including blood chemistry, urine analysis, and biomarker measurements. By providing a thorough assessment of a pet's health, these analyzers enable veterinarians to make well-informed decisions and improve the overall quality of care. Pet owners who are educated about the importance of regular check-ups and diagnostic tests are more likely to seek these services proactively. Veterinary chemistry analyzers excel at early detection, allowing veterinarians to identify and address health issues before they escalate into more severe conditions. This not only improves treatment outcomes but also reduces healthcare costs for pet owners in the long run. Awareness campaigns often highlight the advancements in veterinary diagnostic technology, showcasing the efficiency and accuracy of modern chemistry analyzers. These analyzers are user-friendly, provide rapid results, and can handle a variety of sample types, making them indispensable tools in veterinary medicine. Education efforts also emphasize the importance of integrating diagnostic information into a pet's electronic health record (EHR). This streamlines healthcare management, ensuring that veterinarians have access to a pet's complete medical history, including past diagnostic results. Chemistry analyzers often come up with software solutions that facilitate this integration, enhancing the overall efficiency of pet healthcare.

Key Market Challenges

High Initial Cost

One of the primary challenges in the veterinary chemistry analyzer market is the high initial cost of these diagnostic machines. Veterinary clinics and hospitals, especially in smaller or rural areas, may find it challenging to invest in expensive equipment. This can limit access to advanced diagnostics for some pet owners.

Operating and Maintenance Costs

Beyond the initial purchase, there are ongoing operating and maintenance costs associated with veterinary chemistry analyzers. This includes the cost of consumables, regular maintenance, and updates or repairs. Smaller practices may struggle to allocate resources for these ongoing expenses.

Limited Accessibility in Rural Areas

While pet ownership is not limited to urban areas, advanced veterinary diagnostic services, including those involving chemistry analyzers, are often concentrated in cities and urban centers. Rural areas may have limited access to these services, creating disparities in pet healthcare.

Skilled Personnel Requirement

Operating a veterinary chemistry analyzer requires skilled personnel who can handle the equipment, perform tests accurately, and interpret the results. Training staff members can be time-consuming and costly for veterinary facilities, especially those in regions with a shortage of trained technicians.

Key Market Trends

Miniaturization and Portability

Miniaturization and portability are emerging as prominent trends in veterinary chemistry analyzers. Manufacturers are designing smaller and more compact analyzers, making it easier for veterinarians to perform tests in various settings, including fieldwork and remote locations. Portable analyzers provide the flexibility needed for point-of-care testing, improving the speed and convenience of diagnosis and treatment.

Point-of-Care Testing (POCT)

Point-of-care testing is gaining prominence in the veterinary sector. POCT involves conducting diagnostic tests near the patient, often at the veterinary clinic or even at the pet owner's home. This trend is driven by the need for rapid results and timely decision-making in critical cases. Veterinary chemistry analyzers are being adapted to support POCT, enabling veterinarians to provide faster and more efficient care.

Integration with Electronic Health Records (EHR)

The integration of veterinary chemistry analyzers with electronic health records (EHR) systems is becoming increasingly important. This allows for seamless data management, storage, and sharing of test results, patient history, and treatment plans. EHR integration enhances communication among veterinary care teams and improves

the overall quality of care provided to animals.

Rise of Telemedicine

Telemedicine is becoming increasingly prevalent in veterinary care, especially for follow-up consultations and routine check-ups. Veterinary chemistry analyzers are being adapted to support remote diagnostics, allowing veterinarians to monitor a pet's health and adjust treatment plans without the need for in-person visits.

Segmental Insights

Type Insights

Based on the category of Type, the benchtop veterinary chemistry analyzers segment was the dominant force in the market in 2022. This was largely attributed to the numerous advantages offered by benchtop analyzers, including task automation, reduced manual errors, high levels of accuracy, and precision, which have driven their demand worldwide. These analyzers have proven to be highly effective in diagnosing specific diseases in companion animals, making them a major contributor to this segment's significant market share. The EasyRA benchtop analyzer, for instance, is a fully automated chemistry analyzer that fulfills the cost-effectiveness and speed requirements of veterinary practices. It can be quickly set up and is capable of analyzing samples in under 8 minutes.

Over the projected period, portable analyzers are expected to experience substantial growth. Portable analyzers allow for bedside monitoring and are easily mobile. Their popularity is attributed to their user-friendliness, the convenience of monitoring pets at home, portability, the ability to provide immediate results, and the reduced need for extensive training. The increasing demand for point-of-care analyzers is also contributing to the growth of this segment. Notably, in April 2022, Carolina Liquid Chemistries entered into a semi-exclusive agreement to distribute Seamaty's SMT-120VP Veterinary Automated Chemistry Analyzer in the U.S. veterinary market. Rather than transporting large animals to a testing center, this portable SMT-120VP analyzer can be taken directly to the location of the large animal. This global expansion of the product is expected to further drive market growth.

Species Insights

In 2022, the canine sector took the lead in the veterinary chemistry analyzer market,

primarily due to the widespread prevalence of diseases in dogs and the increasing rates of dog adoption. The market's growth is significantly driven by the rising incidence of major illnesses such as obesity, diabetes, cancer, and others in dogs. According to a report from the American Kennel Club in February 2020, a staggering 56% of dogs in the U.S. were reported as obese.

Conversely, the feline segment is expected to exhibit a noteworthy CAGR during the projected period, mainly because of the growing adoption of cats in both developing and developed economies. Common conditions like endocrine diseases, chronic kidney diseases, and diabetes in cats have further amplified the demand for point-of-care diagnostic tools, offering lucrative growth prospects for this segment.

Additionally, companies are continually investing in research and development to create innovative diagnostic tests for both cats and dogs, aiming to capture a larger market share. For instance, in March 2018, Idexx introduced kidney tests designed for cats and dogs. One of their products, the Catalyst SDMA Test, which assesses kidney function in cats and dogs, can be incorporated into the standard chemistry panel of the company's Catalyst One and Catalyst Dx chemistry analyzers, and it has been made available in the UK and Ireland.

Regional Insights

In 2022, North America led the way in the market. This region boasts a multitude of companies specializing in animal health and diagnostics. A significant increase in veterinary healthcare spending in North America is poised to accelerate market growth. Furthermore, the well-established infrastructure and substantial research and development investments in the region are expected to provide a significant boost to the market. In 2022, the United States took the forefront within the regional market. This can be attributed to the presence of major industry players in the country, such as Zoetis and IDEXX, who play pivotal roles in the development and introduction of analyzers essential for diagnosing various animal diseases.

The Asia Pacific region is forecasted to experience the most rapid expansion during the projected period. This growth can be attributed to the escalating animal population, heightened awareness concerning animal health, and a growing trend of pet adoption. Countries like China and India are anticipated to undergo swift market expansion, primarily due to the proliferation of manufacturing facilities in this region. Additionally, the increased research and development investments by market players in creating enhanced devices are expected to be a driving force behind market growth in this area.

Key Market Players

Zoetis Inc

Heska Corp

IDEXX Laboratories, Inc.

URIT Medical Electronic Co., Ltd.

Randox Laboratories Ltd

Eurolyser Diagnostica GmbH

DiaSys Diagnostic Systems GmbH

skyla corporation

Bioevoke Co., Ltd.

Chengdu Seamaty Technology Co., Ltd

Report Scope:

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

Veterinary Chemistry Analyzer Market, By Type:

Benchtop

Portable

Veterinary Chemistry Analyzer Market, By Product:

Consumables

Instruments

Veterinary Chemistry Analyzer Market, By Species:

Cattle

Canine

Feline

Caprine

Equine

Ovine

Porcine

Avian

Others

Veterinary Chemistry Analyzer Market, By Application:

Blood Chemistry Analysis

Urinalysis

Blood Gas & Electrolyte Analysis

Glucose Monitoring

Veterinary Chemistry Analyzer Market, By End-use:

Veterinary Laboratories

Veterinary Hospitals and Clinics

Point-Of-Care Testing

Others

Veterinary Chemistry Analyzer Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

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 Chemistry Analyzer Market.

Available Customizations:

Global Veterinary Chemistry Analyzer 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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