

# **Veterinary CRO And CDMO Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Animal (Companion Animals, Livestock Animals), By Service (Discovery, Development, Manufacturing, Packaging & Labeling, Market Approval & Post Marketing), By Application (Pharmaceuticals, Biologics, Medical Devices, Others), By Region and Competition, 2020-2030F**

<https://marketpublishers.com/r/V3B196711593EN.html>

Date: July 2025

Pages: 184

Price: US\$ 4,500.00 (Single User License)

ID: V3B196711593EN

## **Abstracts**

### Market Overview

The Global Veterinary CRO and CDMO Market, valued at USD 5.78 Billion in 2024, is projected to reach USD 9.65 Billion by 2030, growing at a CAGR of 8.90%. This growth is fueled by the increasing tendency of pharmaceutical and biotechnology firms to outsource research, development, and manufacturing to reduce operational loads and accelerate timelines. Rising demand for veterinary therapeutics, vaccines, and biologics—particularly for companion animals and livestock—has amplified the need for cost-efficient and compliant contract organizations. CROs support clinical and regulatory functions, while CDMOs offer full-spectrum services from formulation to commercial manufacturing. Additionally, the surge in zoonotic diseases and infectious threats has intensified R&D investments in animal health, boosting the market for specialized outsourcing partners. A major trend influencing the market is the uptick in strategic collaborations and acquisitions among CROs, CDMOs, and veterinary drug developers, driven by the need to broaden global presence and integrate tech-enabled platforms like digital tools and biomarker studies in clinical research.

## Key Market Drivers

### Increase in Companion Animal Ownership and Healthcare Spending

The growing number of companion animals and rising expenditure on their healthcare are pivotal factors driving the Veterinary CRO and CDMO market. Increasingly, pets are being viewed as family members, reshaping consumer spending patterns. According to the 2024 Pet Ownership Survey by the American Veterinary Medical Association, 45.5% of U.S. households own dogs and 32.1% own cats—amounting to nearly 90 million dogs and 74 million cats. Annual veterinary spending averages USD 580 per dog and USD 433 per cat. This surge in pet population and associated healthcare costs has led pharmaceutical and biotech companies to expand their veterinary pipelines, thereby increasing the demand for outsourced R&D and manufacturing services.

## Key Market Challenges

### Limited Availability of Skilled Veterinary Research Professionals

A significant hurdle in the Global Veterinary CRO and CDMO Market is the shortage of skilled veterinary research professionals. Veterinary clinical and preclinical studies require specialized knowledge across diverse species, drug mechanisms, behavioral patterns, and compliance standards. Unlike human trials, veterinary research spans a wide array of animals—companion pets, livestock, equines, and exotic species—each with unique biological needs. This diversity demands expertise in veterinary science, clinical trial methodologies, ethical considerations, and animal care protocols. However, a global shortfall of such multidisciplinary professionals hampers the scalability, timeline adherence, and quality maintenance capabilities of CROs and CDMOs.

## Key Market Trends

### Increased Demand for Biologics and Advanced Veterinary Therapeutics

The demand for biologics and next-generation veterinary therapeutics is significantly shaping the Veterinary CRO and CDMO market. As animal health issues become more complex, there's a growing preference for high-efficacy biologics like monoclonal antibodies, recombinant proteins, and DNA-based vaccines over traditional small-molecule drugs. These innovative solutions are being developed to address serious conditions such as cancer, autoimmune diseases, and chronic infections in both companion and farm animals. This trend is expanding the need for specialized services

from CROs and CDMOs, including immunogenicity evaluations, bioanalytical testing, and biologics manufacturing under high-containment protocols. The advanced infrastructure and analytical capabilities required for biologics are fueling the reliance on expert contract organizations.

## Key Market Players

Fortrea Holdings Inc.

Charles River Laboratories International, Inc.

Clinvet (Pty) Ltd.

KLIFOVET GmbH

Veterinary Research Management, Inc.

VETSPIN SRL

Inotiv, Inc.

IDEXX Laboratories, Inc.

Vetio Animal Health

TriRx Pharmaceutical Services, LLC

## Report Scope:

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

## Veterinary CRO And CDMO Market, By Animal:

Companion Animals

Livestock Animals

Veterinary CRO And CDMO Market, By Service:

Discovery

Development

Manufacturing

Packaging & Labeling

Market Approval & Post Marketing

Veterinary CRO And CDMO Market, By Application:

Pharmaceuticals

Biologics

Medical Devices

Others

Veterinary CRO And CDMO 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

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Veterinary CRO And CDMO Market.

## Available Customizations:

Global Veterinary CRO And CDMO 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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