

Veterinary Immunodiagnosics Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product Type (Analyzers, Consumables) By Animal Type (Livestock (Cattle, Pigs, Poultry, Others), Companion (Feline, Equine, Canine, Others) By Technology (ELISA, Chemiluminescence Immunoassay, Fluorescent Immunoassay, Colorimetric Immunoassay, Radioimmunoassay, Rapid Tests, Others) By Application (Infectious Disease, Autoimmune Disorder, Endocrinology, Oncology, Bone and Mineral Diseases, Others) By End User (Reference Laboratories, Academic and Research Institutes, Veterinary Hospitals & Clinics, Point of care/In-house testing) By Distribution Channel (Hospitals, Retail Stores, Pharmacies & Drug Stores and E-Commerce) By Region & Competition, 2021-2031F

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Abstracts

The Global Veterinary Immunodiagnosics Market is projected to expand from USD 2.94 Billion in 2025 to USD 4.66 Billion by 2031, achieving a compound annual growth rate of 7.98%. This specialized sector of animal healthcare employs antigen-antibody interactions to identify infectious pathogens, measure hormone levels, and assess

immune responses across both livestock and companion animals. Growth in this market is primarily fueled by an increasing global pet population and the escalating need for efficient food animal production, both of which demand rigorous disease surveillance. These drivers are further bolstered by the rising incidence of zoonotic diseases, establishing a fundamental need for precise screening tools that goes beyond temporary trends. The sector's economic strength is significant; the American Pet Products Association reported that veterinary care and product sales in the United States hit \$39.8 billion in 2024.

However, a significant impediment to broader market expansion is the prohibitive cost associated with advanced immunodiagnostic assays, which restricts their accessibility in price-sensitive regions. While developed markets continue to integrate these diagnostic modalities, the financial burden remains a barrier for smaller veterinary practices and developing economies. This challenge is frequently compounded by a scarcity of veterinary professionals trained to interpret complex diagnostic results, thereby limiting the universal penetration of high-precision immunodiagnostic technologies.

Market Driver

The surge in pet ownership and the humanization of animals serves as a major engine for the Global Veterinary Immunodiagnostics Market, reshaping the economics of veterinary care. As owners increasingly treat pets as family members, there is a growing willingness to fund preventative healthcare and advanced diagnostics. This trend is financially supported by the booming pet insurance industry, which helps offset costs for complex testing. The North American Pet Health Insurance Association's '2024 State of the Industry Report' noted that total pet health insurance premiums in the U.S. reached \$3.9 billion in 2023, showing double-digit growth. This rise in insured pets correlates directly with increased use of immunodiagnostic panels, allowing veterinarians to order comprehensive diagnostics with higher confidence in client compliance and reimbursement.

Concurrently, the increasing prevalence of zoonotic and infectious animal diseases creates an urgent demand for rapid and sensitive detection tools in both the companion animal and livestock sectors. Transboundary pathogens pose threats to public health and global food security, requiring robust surveillance based on immunodiagnostic technology. A clear example of this risk occurred when the USDA Animal and Plant Health Inspection Service confirmed the detection of Highly Pathogenic Avian Influenza in dairy herds in April 2024, prompting immediate demand for targeted testing. The scale of these market forces is reflected in industry financial results; IDEXX

Laboratories reported annual revenues of \$3.66 billion for 2023 in their February 2024 results, highlighting the substantial value driven by the demand for veterinary diagnostics.

Market Challenge

The prohibitive cost associated with advanced immunodiagnostic assays stands as a primary obstruction to the expansive growth of the Global Veterinary Immunodiagnostics Market. While these diagnostic tools offer high precision for detecting pathogens and immune responses, their elevated pricing structure severely restricts their adoption, particularly within price-sensitive geographies and smaller independent veterinary practices. This financial barrier forces veterinarians and livestock producers to prioritize essential treatments over rigorous screening, leading to a lower volume of test utilization. Consequently, the market faces a bottleneck where the technological capability to detect diseases exists, but the economic capacity to deploy these tools at scale is absent, thereby stalling potential revenue streams in developing economies.

This economic strain directly correlates with reduced veterinary engagement, which hampers the overall demand for diagnostic consumption. When pet owners and producers face rising healthcare expenses, routine and diagnostic visits are often the first to be curtailed. According to the American Veterinary Medical Association, in 2024, patient visits to veterinary practices decreased by 2.3% compared to the previous year. This decline in clinical foot traffic inevitably results in fewer diagnostic panels being run, directly reducing the serviceable addressable market for immunodiagnostic products. As long as these assays remain financially out of reach for a significant portion of the global veterinary sector, the market's growth trajectory will remain constrained by these affordability thresholds.

Market Trends

The emergence of biosensor-based immunodiagnostic technologies is revolutionizing veterinary practice by delivering reference-laboratory precision directly at the point of care. Unlike standard lateral flow assays, these advanced platforms utilize technologies such as Bulk Acoustic Wave (BAW) sensors to detect hormones and pathogens with superior sensitivity, enabling immediate, data-driven treatment decisions during patient visits. This technological shift is gaining significant commercial traction as clinics increasingly prioritize diagnostic speed without compromising analytical accuracy. According to Investing.com, November 2024, in the 'Zomedica reports record Q3

revenue' article, Zomedica announced an 80% increase in TRUFORMA platform sales for the third quarter of 2024, validating the accelerating adoption of these high-precision diagnostic instruments in veterinary settings.

Simultaneously, the commercialization of novel biomarkers for early disease detection is expanding the market's scope beyond infectious disease management into oncology and chronic care. Diagnostics are increasingly utilizing circulating nucleosomes and other non-invasive markers to facilitate affordable, routine screening of cancers before clinical symptoms manifest. This transition towards preventative medicine generates new recurring revenue streams for practices while significantly improving patient prognoses through earlier intervention. Highlighting this rapid market uptake, according to VolitionRx Limited, November 2024, in the 'Third Quarter 2024 Financial Results and Business Update', the company reported selling over 110,000 Nu.Q Vet Cancer Tests in the first nine months of 2024, with Q3 revenue rising 307% year-over-year.

Key Market Players

Zoetis Inc.

IDEXX Laboratories, Inc.

Abaxis, Inc.

Biogal-Galed Labs Ltd.

Boehringer Ingelheim Animal Health GmbH

Thermo Fisher Scientific Inc.

Heska Corporation

Virbac S.A.

Merial Limited

Agrolabo S.p.A.

Report Scope

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

Veterinary Immunodiagnosics Market, By Product Type

Analyzers

Consumables

Veterinary Immunodiagnosics Market, By Animal Type

Livestock (Cattle

Pigs

Poultry

Others)

Companion (Feline

Equine

Canine

Others)

Veterinary Immunodiagnosics Market, By Technology

ELISA

Chemiluminescence Immunoassay

Fluorescent Immunoassay

Colorimetric Immunoassay

Radioimmunoassay

Rapid Tests

Others

Veterinary Immunodiagnosics Market, By Application

Infectious Disease

Autoimmune Disorder

Endocrinology

Oncology

Bone and Mineral Diseases

Others

Veterinary Immunodiagnosics Market, By End User

Reference Laboratories

Academic and Research Institutes

Veterinary Hospitals & Clinics

Point of care/In-house testing

Veterinary Immunodiagnosics Market, By Distribution Channel

Hospitals

Retail Stores

Pharmacies & Drug Stores

E-Commerce

Veterinary Immunodiagnosics 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 Immunodiagnosics Market.

Available Customizations:

Global Veterinary Immunodiagnosics 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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