

# **Veterinary Molecular Diagnostic Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (Instruments, Kit and Reagents, Software and Services), By Application (Infectious Diseases, Genetics, Other), By Technology (PCR, Microarray, DNA Sequencing), By Region and Competition, 2019-2029F**

<https://marketpublishers.com/r/VD230065CC04EN.html>

Date: July 2024

Pages: 182

Price: US\$ 4,900.00 (Single User License)

ID: VD230065CC04EN

## **Abstracts**

Global Veterinary Molecular Diagnostic Market was valued at USD 0.48 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 8.65% through 2029. The Global Veterinary Molecular Diagnostics Market is a dynamic sector poised for substantial growth, driven by the increasing demand for precise and rapid diagnostic solutions in animal healthcare. This market encompasses a wide array of molecular diagnostic techniques tailored specifically for veterinary applications, including PCR (Polymerase Chain Reaction), microarrays, sequencing, and other advanced technologies. Key factors fueling market expansion include rising incidences of infectious diseases among animals, the growing prevalence of zoonotic diseases, and the escalating need for early disease detection to ensure optimal animal health and productivity. The emergence of novel pathogens and the constant threat of disease outbreaks underline the importance of robust molecular diagnostic tools in veterinary medicine.

Furthermore, technological advancements such as point-of-care testing and the development of portable diagnostic devices are enhancing accessibility and efficiency in veterinary diagnostics, particularly in remote or resource-limited settings. The market is characterized by a competitive landscape with key players investing in research and development to introduce innovative diagnostic solutions and broaden their product

portfolios. Strategic collaborations, mergers, and acquisitions are prevalent strategies among market participants to strengthen their market presence and expand their geographic reach. Regulatory initiatives aimed at standardizing veterinary diagnostics and ensuring product efficacy and safety are also shaping the market landscape. As the global awareness of animal health and welfare continues to rise, coupled with the increasing adoption of pets and livestock for companionship, food production, and other purposes, the veterinary molecular diagnostics market is anticipated to witness sustained growth in the coming years.

## Key Market Drivers

### Rising Incidences of Infectious Diseases

The rising incidences of infectious diseases among animals have emerged as a significant driver fueling the growth of the Global Veterinary Molecular Diagnostics Market. Across the spectrum of animal populations, including pets, livestock, and wildlife, there has been a notable increase in the prevalence of infectious agents. Pathogens such as bacteria, viruses, fungi, and parasites pose substantial threats to animal health, welfare, and productivity. Factors such as globalization, climate change, intensified livestock production systems, and changes in land use have contributed to the spread and emergence of infectious diseases in animal populations.

Veterinary molecular diagnostics play a pivotal role in addressing this challenge by providing rapid and accurate identification of pathogens. Techniques such as Polymerase Chain Reaction (PCR), nucleic acid sequencing, and microarray analysis enable veterinarians to detect and characterize infectious agents with high sensitivity and specificity. This capability is particularly crucial in the early diagnosis of emerging or novel pathogens for which traditional diagnostic methods may be inadequate or time-consuming. Furthermore, the ability to swiftly identify infectious diseases facilitates prompt implementation of control measures, including quarantine, treatment, and vaccination programs. By containing outbreaks at their inception, molecular diagnostics help prevent the spread of diseases within animal populations and minimize their impact on animal health and productivity. Early detection enables veterinarians to provide targeted treatment strategies, reducing the risk of antimicrobial resistance and improving treatment outcomes.

The demand for veterinary molecular diagnostics is further amplified by the economic consequences associated with infectious disease outbreaks. Disease outbreaks can

result in significant losses for the livestock industry due to decreased production, trade restrictions, and increased veterinary and healthcare costs. Timely and accurate diagnosis facilitated by molecular techniques helps mitigate these economic impacts by enabling swift intervention and control measures.

## Technological Advancements

Technological advancements have been instrumental in propelling the growth of the Global Veterinary Molecular Diagnostics Market, revolutionizing the landscape of veterinary diagnostics and driving innovation in testing methodologies. These advancements have led to the development of more sophisticated and efficient diagnostic tools, enabling veterinarians to diagnose diseases with greater accuracy, speed, and convenience. One of the key technological advancements driving the veterinary molecular diagnostics market is the advent of Polymerase Chain Reaction (PCR) technology. PCR allows for the amplification of DNA or RNA sequences from a small sample, making it possible to detect even trace amounts of pathogens in clinical specimens. This technique has become a cornerstone of veterinary diagnostics, enabling rapid and sensitive detection of infectious agents such as bacteria, viruses, and parasites.

In addition to PCR, next-generation sequencing (NGS) technologies have revolutionized the field of molecular diagnostics by enabling high-throughput sequencing of entire genomes or targeted gene panels. NGS technologies offer unprecedented insights into the genetic diversity of pathogens, facilitating the identification of emerging strains and the characterization of antimicrobial resistance genes. This information is invaluable for guiding treatment decisions and implementing effective control measures. Furthermore, microarray technology has emerged as a powerful tool for multiplexed detection of pathogens, allowing for the simultaneous analysis of multiple targets in a single assay. Microarrays offer high throughput and versatility, making them well-suited for screening large numbers of samples for infectious agents or genetic markers of disease.

The development of point-of-care testing (POCT) devices and portable diagnostic instruments has also been a significant technological advancement in veterinary molecular diagnostics. These compact and user-friendly devices enable rapid on-site testing in diverse settings, including veterinary clinics, farms, and field research stations. POCT devices facilitate real-time decision-making and prompt initiation of treatment, improving patient outcomes and reducing the spread of infectious diseases.

## Key Market Challenges

### Cost Constraints

One of the primary challenges facing the Global Veterinary Molecular Diagnostics Market is the high cost associated with molecular diagnostic tests. The initial investment in equipment, reagents, and skilled personnel required to perform molecular assays can be prohibitive for many veterinary clinics, particularly those in resource-limited settings or smaller practices. The cost of molecular tests themselves may be perceived as a barrier by pet owners or livestock producers, especially for routine screening or surveillance purposes. Addressing cost constraints through technological innovations, economies of scale, and strategic pricing strategies is essential to enhance accessibility and affordability of molecular diagnostics in veterinary medicine.

### Sample Quality and Handling

The quality of the sample plays a crucial role in the accuracy and reliability of molecular diagnostic tests. However, obtaining high-quality samples from animals can be challenging due to various factors such as sample collection techniques, sample stability during transportation, and the presence of inhibitors that may interfere with molecular assays. Inadequate sample quality or improper handling procedures can lead to false-negative or false-positive results, compromising the diagnostic accuracy of molecular tests. Addressing sample quality and handling challenges requires standardized protocols for sample collection, storage, and transportation, as well as the development of robust quality control measures to assess sample integrity before testing.

## Key Market Trends

### Increasing Companion Animal Ownership

Increasing companion animal ownership has emerged as a significant driver fueling the growth of the Global Veterinary Molecular Diagnostics Market. The trend of pet ownership has been steadily rising worldwide, driven by factors such as urbanization, changing lifestyles, and growing awareness of the benefits of pet companionship. As more people welcome pets into their homes, the demand for veterinary services, including diagnostic testing, has surged. Companion animals, including dogs, cats, and exotic pets, are valued members of the family, and pet owners are increasingly invested in ensuring their health and well-being. Molecular diagnostics play a crucial role in the

diagnosis and management of various diseases and conditions in companion animals, offering greater accuracy, sensitivity, and efficiency compared to traditional diagnostic methods.

One of the key drivers of demand for veterinary molecular diagnostics among pet owners is the desire for early disease detection and preventive care. Pet owners are proactive in seeking regular veterinary check-ups and screening tests for their pets to identify potential health issues before they become symptomatic. Molecular diagnostic tests, such as PCR assays and genetic screening panels, enable veterinarians to detect infectious diseases, genetic disorders, and predispositions to certain conditions at earlier stages, allowing for timely intervention and treatment. The human-animal bond has strengthened in recent years, with pets playing increasingly integral roles in the lives of their owners. Pet owners are more willing to invest in advanced veterinary care, including molecular diagnostics, to ensure the health and longevity of their beloved companions. This emotional attachment to pets drives demand for cutting-edge diagnostic technologies that offer greater diagnostic accuracy and treatment options.

Advancements in veterinary medicine, including personalized medicine and targeted therapies, have further fueled the demand for molecular diagnostics in companion animal healthcare. Molecular diagnostic tests provide valuable information about an individual animal's genetic makeup, enabling veterinarians to tailor treatment plans to the specific needs of each patient.

### Focus on Food Safety and Animal Welfare

The focus on food safety and animal welfare has become increasingly prominent in recent years, driving the growth of the Global Veterinary Molecular Diagnostics Market. As consumers become more conscientious about the origin and quality of the food they consume, there is growing demand for rigorous safety standards and transparent supply chains in the food industry. In response, stakeholders across the food production chain, including producers, regulators, and consumers, are prioritizing measures to ensure the safety and welfare of animals raised for food production. Veterinary molecular diagnostics play a critical role in enhancing food safety by enabling the rapid and accurate detection of pathogens in livestock and poultry populations. Infectious agents such as Salmonella, Campylobacter, and Escherichia coli pose significant risks to human health if present in food products. Molecular diagnostic techniques, such as Polymerase Chain Reaction (PCR) and nucleic acid sequencing, offer high sensitivity and specificity in detecting these pathogens, allowing for timely intervention

to prevent foodborne illness outbreaks.

Furthermore, molecular diagnostics contribute to animal welfare by facilitating early disease detection and monitoring in livestock populations. Diseases such as bovine respiratory disease, porcine reproductive and respiratory syndrome, and avian influenza can have detrimental effects on animal health and welfare, as well as on productivity in food animal production systems. By identifying infected animals and implementing appropriate control measures, molecular diagnostics help minimize the spread of diseases within herds and flocks, reducing suffering and improving overall welfare. The adoption of molecular diagnostics in veterinary medicine also supports sustainable agricultural practices by promoting responsible antimicrobial use and reducing the need for prophylactic treatments. By accurately diagnosing diseases and identifying the causative agents, veterinarians can prescribe targeted therapies and interventions, minimizing the use of antibiotics and other antimicrobial agents. This approach helps mitigate the risk of antimicrobial resistance and supports the long-term viability of food production systems.

## Segmental Insights

### Product Insights

Based on the product, kit and reagents segment emerged as the dominant segment in the global Veterinary Molecular Diagnostic market in 2023. The kit and reagents segment benefits from the widespread adoption of molecular diagnostic techniques such as Polymerase Chain Reaction (PCR), which relies heavily on specific kits and reagents for amplification and detection of nucleic acids. These kits and reagents are essential components of molecular assays, enabling veterinarians to perform a wide range of tests for the diagnosis of infectious diseases, genetic disorders, and other conditions in animals. Furthermore, advancements in kit and reagent technologies, such as the development of multiplex assays and ready-to-use PCR kits, have facilitated the adoption of molecular diagnostics in veterinary medicine. These innovations enhance the efficiency, accuracy, and convenience of testing procedures, further driving the growth of the kit and reagents segment.

### Application Insights

Based on the application, infectious diseases segment emerged as the dominant segment in the global veterinary molecular diagnostic market in 2023. Infectious diseases pose significant threats to animal health, welfare, and productivity, making

their accurate and timely diagnosis a top priority for veterinarians and livestock producers. Molecular diagnostic techniques offer unparalleled sensitivity and specificity in detecting a wide range of pathogens, including bacteria, viruses, fungi, and parasites, facilitating rapid identification and control of infectious disease outbreaks. As the global awareness of infectious disease threats continues to grow, the demand for advanced molecular diagnostic tests for infectious diseases in veterinary medicine is expected to remain strong.

## Regional Insights

North America emerged as the dominant region in the Global Veterinary Molecular Diagnostics Market in 2023, holding the largest market share. North America boasts a highly developed veterinary healthcare infrastructure, characterized by advanced diagnostic facilities, well-established veterinary clinics, and research institutions. The region benefits from a strong network of veterinary professionals, including veterinarians, laboratory technicians, and researchers, who are well-equipped to adopt and utilize molecular diagnostic technologies in veterinary medicine effectively. Furthermore, North America is home to several leading companies and research organizations at the forefront of innovation in veterinary molecular diagnostics. These companies invest heavily in research and development to develop novel diagnostic assays, technologies, and platforms, driving market growth and competitiveness in the region. Favorable government policies, regulatory support, and reimbursement schemes for veterinary diagnostics contribute to the market's growth trajectory in North America. The region's robust economy, high pet ownership rates, and increasing awareness of animal health and welfare also fuel the demand for molecular diagnostic tests in veterinary medicine.

## Key Market Players

Biochek BV

Biomerieux SA

Bioneer Corporation

Idexx Laboratories Inc.

Ingenetix GmbH

Neogen Corporation

ThermoFischer Scientific Inc.

Veterinary Molecular Diagnostics Inc.

Biomedica Medizinprodukte GmbH

Novacyt Group

### Report Scope:

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

#### Veterinary Molecular Diagnostic Market, By Product:

Instruments

Kit and Reagents

Software and Services

#### Veterinary Molecular Diagnostic Market, By Application:

Infectious Diseases

Genetics

Other

#### Veterinary Molecular Diagnostic Market, By Technology:

PCR

Microarray



DNA Sequencing

Veterinary Molecular Diagnostic 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 Molecular Diagnostic Market.

### Available Customizations:

Global Veterinary Molecular Diagnostic 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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