

Veterinary Reference Laboratory Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Services Type (Clinical Chemistry, Immunodiagnosics (ELISA, Lateral Flow Assays, Other Immunodiagnosics Services), Molecular Diagnostics (PCR Tests, Microarrays, Other Molecular Diagnostics Services), Hematology, Urinalysis, Other Services), By Application (Clinical Pathology, Bacteriology, Parasitology, Virology, Productivity Testing, Pregnancy Testing, Toxicology Testing), By Animal Type (Companion Animals (Dogs, Cats, Horses, Other Companion Animals), Livestock Animals (Cattle, Swine, Poultry, Other Livestock Animals)), By Region and Competition, 2019-2029F

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Abstracts

Global Veterinary Reference Laboratory Market was valued at USD 4.52 Billion in 2023 and is anticipated to project steady growth in the forecast period with a CAGR of 5.25% through 2029. The global veterinary reference laboratory market has witnessed remarkable growth in recent years, driven by a confluence of factors such as increasing pet ownership, rising awareness about animal health, and advancements in diagnostic technologies. Veterinary reference laboratories play a pivotal role in offering a comprehensive array of diagnostic tests and services to veterinarians, researchers, and animal owners, contributing to the overall well-being of companion and livestock

animals. The burgeoning trend of pet ownership worldwide has been a key catalyst for the growth of the veterinary reference laboratory market. Pet owners are increasingly seeking advanced diagnostic services for their furry companions, leading to an upsurge in demand for comprehensive veterinary testing.

Technological advancements have revolutionized veterinary diagnostics, enabling more accurate and timely detection of diseases. Molecular diagnostics, serology, hematology, and other cutting-edge technologies have empowered veterinary reference laboratories to provide precise and efficient diagnostic solutions. Growing awareness among pet owners and livestock farmers about the importance of preventive healthcare has driven the demand for regular diagnostic screenings. Veterinary reference laboratories offer a wide range of tests for infectious diseases, genetic disorders, and other health concerns, fostering proactive animal healthcare. The globalization of veterinary services has expanded the reach of veterinary reference laboratories. International collaborations and partnerships between veterinary laboratories have facilitated the exchange of knowledge, resources, and diagnostic capabilities on a global scale.

Key Market Drivers

Increasing Pet Ownership and Humanization of Pets is Driving the Global Veterinary Reference Laboratory Market

The global veterinary reference laboratory market has witnessed remarkable growth in recent years, with the surge in pet ownership and the evolving trend of humanization of pets playing pivotal roles. As more people around the world bring pets into their homes and treat them as integral family members, the demand for advanced veterinary care and diagnostic services has skyrocketed. Veterinary reference laboratories have become essential in providing accurate and comprehensive diagnostic solutions, contributing significantly to the expansion of the global market. The phenomenon of increasing pet ownership is a global trend that transcends cultural and geographical boundaries. Millennials, in particular, have shown a notable inclination towards adopting pets, considering them as companions, and even as substitutes for traditional family structures. This cultural shift has given rise to a burgeoning pet industry, encompassing pet food, accessories, grooming services, and, crucially, healthcare.

Moreover, the humanization of pets has become a driving force behind the demand for high-quality veterinary services. Pet owners are increasingly seeking healthcare services, preventive care, and diagnostic testing for their furry companions, mirroring the level of attention given to human family members. This shift in perception has

resulted in a paradigm change, transforming pets from mere animals to cherished family members, thereby fueling the demand for advanced veterinary diagnostics. Veterinary reference laboratories play a pivotal role in meeting the growing demand for sophisticated diagnostic services in the realm of pet healthcare. These laboratories offer a comprehensive range of diagnostic tests, including blood tests, urinalysis, imaging, pathology, and microbiology. The emphasis on early disease detection, preventive care, and personalized treatment plans for pets has led to an increased reliance on veterinary reference laboratories. The diagnostic capabilities of these laboratories enable veterinarians to provide accurate and timely diagnoses, facilitating better-informed treatment decisions. From identifying underlying health conditions to monitoring treatment responses, veterinary reference laboratories contribute significantly to enhancing the overall quality of care for pets.

Prevalence of Zoonotic Diseases is Driving the Global Veterinary Reference Laboratory Market

Zoonotic diseases, those that can be transmitted between animals and humans, have garnered increased attention in recent years due to their potential for widespread impact on both public health and global economies. As these diseases continue to pose significant threats, the demand for advanced diagnostic tools and veterinary services has surged, leading to the growth of the global veterinary reference laboratory market. The rise in zoonotic diseases has been fueled by various factors, including increased urbanization, changes in land use, and the globalization of trade and travel. Diseases such as avian influenza, rabies, and COVID-19 have underscored the interconnectedness between animals and humans, highlighting the need for comprehensive strategies to monitor, detect, and control the spread of these diseases.

Veterinary reference laboratories play a pivotal role in the detection, diagnosis, and monitoring of zoonotic diseases. These specialized laboratories offer a range of services, including pathology, microbiology, serology, and molecular diagnostics. They provide essential support for veterinarians, researchers, and public health officials in understanding and combating the threats posed by zoonoses. The increasing prevalence of zoonotic diseases has led to a growing demand for veterinary diagnostic services, thereby driving the expansion of the global veterinary reference laboratory market. The market is characterized by the presence of key players offering a wide array of diagnostic tests and services for various animal species.

The Asia-Pacific region, in particular, has witnessed significant growth in the veterinary reference laboratory market due to the rising incidence of zoonotic diseases and

increased awareness about the importance of early detection. North America and Europe also contribute substantially to the market, with advanced veterinary healthcare infrastructure and a focus on research and development. The veterinary reference laboratory market has benefited from rapid technological advancements in diagnostic tools. Molecular diagnostics, next-generation sequencing, and advanced imaging techniques have revolutionized the detection and characterization of zoonotic pathogens. These innovations enable quicker and more accurate diagnoses, facilitating timely interventions and containment efforts.

Collaboration between veterinary laboratories, public health agencies, and research institutions is crucial for a holistic approach to zoonotic disease management. Surveillance programs that monitor the health of both domestic and wild animals, coupled with effective communication channels between veterinarians and healthcare professionals, contribute to early detection and response to potential outbreaks.

Key Market Challenges

Supply Chain Disruptions

A supply chain disruption refers to the interruption or breakdown in the flow of goods, services, or information within the supply chain network. These disruptions can be triggered by a myriad of factors, including natural disasters, geopolitical tensions, pandemics, economic crises, and even technological failures. In the context of the Global Veterinary Reference Laboratory Market, these disruptions can have severe consequences on the availability of essential diagnostic tools, reagents, and equipment, affecting the overall efficiency of laboratory operations. Supply chain disruptions often lead to delays in the production and distribution of veterinary diagnostic products. Laboratories may experience shortages in crucial reagents and testing equipment, hampering their ability to provide timely and accurate diagnostic services. This, in turn, can negatively impact patient care, as delayed diagnostics may impede the swift initiation of treatment.

Increased demand for veterinary diagnostic services, coupled with supply chain disruptions, can drive up costs. Shortages of essential supplies may lead to higher prices for diagnostic tests, putting a strain on both veterinary laboratories and pet owners. This economic pressure can create challenges for market players, potentially affecting their competitiveness and profitability. The veterinary reference laboratory market is inherently global, with suppliers, manufacturers, and distributors operating on an international scale. This interconnectedness means that disruptions in one part of the

world can have ripple effects across the entire supply chain. For example, geopolitical tensions or trade restrictions can impact the availability of critical components, affecting laboratories worldwide.

In response to supply chain disruptions, companies in the veterinary reference laboratory market are compelled to adapt and innovate. This may involve diversifying suppliers, implementing advanced inventory management systems, and exploring alternative sourcing strategies. Companies that can effectively navigate these challenges may emerge stronger and more resilient in the long run. Effective communication and collaboration between stakeholders in the supply chain are essential for mitigating the impact of disruptions. Proactive measures, such as regular risk assessments, contingency planning, and transparent communication channels, can help identify potential vulnerabilities and enable swift responses to emerging challenges.

Key Market Trends

Technological Advancements

One of the key technological advancements in veterinary diagnostics is the increased use of automation and robotics. Automated laboratory equipment and robotic systems have streamlined the testing process, reducing the time required for diagnostics and improving overall efficiency. These technologies enable laboratories to handle a higher volume of samples with greater precision, leading to quicker and more accurate results. This has significantly contributed to the growth of the veterinary reference laboratory market by enhancing diagnostic capabilities and expanding testing capacities.

The advent of molecular diagnostic techniques has revolutionized veterinary testing. Polymerase Chain Reaction (PCR), next-generation sequencing (NGS), and other molecular biology techniques have allowed for more detailed and specific analysis of pathogens, genetic disorders, and other health conditions in animals. Molecular diagnostics not only offer faster results but also enable veterinarians to detect diseases at an earlier stage, facilitating more effective treatment. This has led to an increased demand for molecular diagnostic services in veterinary reference laboratories worldwide. The rise of telemedicine and digital health solutions has had a profound impact on veterinary care. With the help of remote monitoring devices, teleconsultations, and digital health records, veterinarians can now provide more comprehensive and timely healthcare services. Veterinary reference laboratories are adopting digital platforms to efficiently manage and share test results with pet owners

and healthcare providers. This digital transformation has not only improved communication in the veterinary ecosystem but has also enhanced the accessibility of laboratory services, fostering market growth.

Data analytics and artificial intelligence (AI) are playing an increasingly crucial role in veterinary diagnostics. AI algorithms can analyze vast amounts of data, identify patterns, and assist in the interpretation of diagnostic results. This not only speeds up the decision-making process but also improves the accuracy of diagnoses. The integration of AI in veterinary reference laboratories enhances the overall efficiency of testing procedures and contributes to the market's growth by providing more sophisticated and data-driven insights. Advancements in point-of-care testing have allowed veterinarians to perform certain diagnostic tests on-site, eliminating the need for sending samples to reference laboratories. Portable diagnostic devices enable rapid and real-time analysis, allowing for immediate decision-making and treatment initiation. This has not only improved the efficiency of veterinary healthcare but has also driven the demand for point-of-care testing solutions, positively impacting the veterinary reference laboratory market.

Segmental Insights

Application Insights

Based on the category of Application, Bacteriology emerged as the dominated player in the global market for Veterinary Reference Laboratory in 2023. Bacteriology has gained prominence in veterinary reference laboratories due to its pivotal role in diagnosing infectious diseases. Bacterial infections can affect a wide range of animals, from livestock in agricultural settings to beloved pets in households. Veterinary bacteriologists analyze samples such as blood, urine, and tissue to identify the presence of pathogenic bacteria and determine the specific strain responsible for an infection. Bacteriology helps in identifying bacterial pathogens responsible for various diseases in animals. Accurate identification is crucial for prescribing targeted treatments and preventing the spread of infectious agents. Bacterial cultures are subjected to antimicrobial susceptibility testing to determine the most effective antibiotics for treating specific infections. This ensures that animals receive appropriate and timely treatment, preventing the development of antibiotic resistance. Bacteriology contributes to epidemiological studies by tracking the prevalence and distribution of bacterial infections. This information is vital for implementing preventive measures and controlling outbreaks. Bacteriology plays a crucial role in monitoring zoonotic diseases, which can be transmitted from animals to humans. Identifying and addressing these diseases in

animals is essential for safeguarding public health.

Regional Insights

North America emerged as the dominated region in the global Veterinary Reference Laboratory market in 2023, holding the largest market share in terms of value. North America boasts a sophisticated healthcare infrastructure that extends to veterinary services. The presence of state-of-the-art diagnostic facilities, cutting-edge technology, and a well-established network of veterinary clinics and hospitals positions the region at the forefront of veterinary diagnostics. These advanced facilities enable quick and accurate diagnosis, contributing to the overall growth of the veterinary reference laboratory market. The increasing trend of pet ownership in North America has played a pivotal role in driving the demand for veterinary reference laboratory services. Pets are increasingly considered part of the family, leading to a growing emphasis on their health and well-being. This cultural shift has fueled the need for comprehensive diagnostic services, including routine check-ups, genetic testing, and disease screenings, contributing to the expansion of the veterinary reference laboratory market.

Key Market Players

IDEXX Laboratories, Inc.

VCA, Inc.

GD Animal Health

Zoetis Inc.

NEOGEN Corporation

LABOKLIN GmbH

SYNLAB International GmbH

Heska Corporation

Virbac inc.

Vaxxinova GmbH

Thermo Fisher Scientific, Inc

Report Scope:

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

Veterinary Reference Laboratory Market, By Service Type:

Clinical Chemistry

Immunodiagnosics

Molecular Diagnostics

Hematology

Urinalysis

Other Services

Veterinary Reference Laboratory Market, By Application:

Clinical Pathology

Bacteriology

Parasitology

Virology

Productivity Testing

Pregnancy Testing

Toxicology Testing

Veterinary Reference Laboratory Market, By Animal Type:

Companion Animals

Livestock Animals

Veterinary Reference Laboratory 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 Reference Laboratory Market.

Available Customizations:

Global Veterinary Reference Laboratory 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. GLOBAL VETERINARY REFERENCE LABORATORY MARKET OUTLOOK

- 4.1. Market Size & Forecast
 - 4.1.1. By Value
- 4.2. Market Share & Forecast
 - 4.2.1. By Services Type (Clinical Chemistry, Immunodiagnosics (ELISA, Lateral Flow Assays, Other Immunodiagnosics Services), Molecular Diagnostics(PCR Tests, Microarrays, Other Molecular Diagnostics Services), Hematology, Urinalysis, Other Services)
 - 4.2.2. By Application (Clinical Pathology, Bacteriology, Parasitology, Virology, Productivity Testing, Pregnancy Testing, Toxicology Testing)

4.2.3. By Animal Type (Companion Animals(Dogs, Cats, Horses, Other Companion Animals), Livestock Animals (Cattle, Swine, Poultry, Other Livestock Animals))

4.2.4. By Region

4.2.5. By Company (2023)

4.3. Market Map

4.3.1. By Services Type

4.3.2. By Application

4.3.3. By Animal Type

4.3.4. By Region

5. ASIA PACIFIC VETERINARY REFERENCE LABORATORY MARKET OUTLOOK

5.1. Market Size & Forecast

5.1.1. By Value

5.2. Market Share & Forecast

5.2.1. By Services Type

5.2.2. By Application

5.2.3. By Animal Type

5.2.4. By Country

5.3. Asia Pacific: Country Analysis

5.3.1. China Veterinary Reference Laboratory Market Outlook

5.3.1.1. Market Size & Forecast

5.3.1.1.1. By Value

5.3.1.2. Market Share & Forecast

5.3.1.2.1. By Services Type

5.3.1.2.2. By Application

5.3.1.2.3. By Animal Type

5.3.2. India Veterinary Reference Laboratory Market Outlook

5.3.2.1. Market Size & Forecast

5.3.2.1.1. By Value

5.3.2.2. Market Share & Forecast

5.3.2.2.1. By Services Type

5.3.2.2.2. By Application

5.3.2.2.3. By Animal Type

5.3.3. Australia Veterinary Reference Laboratory Market Outlook

5.3.3.1. Market Size & Forecast

5.3.3.1.1. By Value

5.3.3.2. Market Share & Forecast

5.3.3.2.1. By Services Type

- 5.3.3.2.2. By Application
- 5.3.3.2.3. By Animal Type
- 5.3.4. Japan Veterinary Reference Laboratory Market Outlook
 - 5.3.4.1. Market Size & Forecast
 - 5.3.4.1.1. By Value
 - 5.3.4.2. Market Share & Forecast
 - 5.3.4.2.1. By Services Type
 - 5.3.4.2.2. By Application
 - 5.3.4.2.3. By Animal Type
- 5.3.5. South Korea Veterinary Reference Laboratory Market Outlook
 - 5.3.5.1. Market Size & Forecast
 - 5.3.5.1.1. By Value
 - 5.3.5.2. Market Share & Forecast
 - 5.3.5.2.1. By Services Type
 - 5.3.5.2.2. By Application
 - 5.3.5.2.3. By Animal Type

6. EUROPE VETERINARY REFERENCE LABORATORY MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Services Type
 - 6.2.2. By Application
 - 6.2.3. By Animal Type
 - 6.2.4. By Country
- 6.3. Europe: Country Analysis
 - 6.3.1. France Veterinary Reference Laboratory Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Services Type
 - 6.3.1.2.2. By Application
 - 6.3.1.2.3. By Animal Type
 - 6.3.2. Germany Veterinary Reference Laboratory Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Services Type

- 6.3.2.2.2. By Application
- 6.3.2.2.3. By Animal Type
- 6.3.3. Spain Veterinary Reference Laboratory Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Services Type
 - 6.3.3.2.2. By Application
 - 6.3.3.2.3. By Animal Type
- 6.3.4. Italy Veterinary Reference Laboratory Market Outlook
 - 6.3.4.1. Market Size & Forecast
 - 6.3.4.1.1. By Value
 - 6.3.4.2. Market Share & Forecast
 - 6.3.4.2.1. By Services Type
 - 6.3.4.2.2. By Application
 - 6.3.4.2.3. By Animal Type
- 6.3.5. United Kingdom Veterinary Reference Laboratory Market Outlook
 - 6.3.5.1. Market Size & Forecast
 - 6.3.5.1.1. By Value
 - 6.3.5.2. Market Share & Forecast
 - 6.3.5.2.1. By Services Type
 - 6.3.5.2.2. By Application
 - 6.3.5.2.3. By Animal Type

7. NORTH AMERICA VETERINARY REFERENCE LABORATORY MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Services Type
 - 7.2.2. By Application
 - 7.2.3. By Animal Type
 - 7.2.4. By Country
- 7.3. North America: Country Analysis
 - 7.3.1. United States Veterinary Reference Laboratory Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast

- 7.3.1.2.1. By Services Type
- 7.3.1.2.2. By Application
- 7.3.1.2.3. By Animal Type
- 7.3.2. Mexico Veterinary Reference Laboratory Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Services Type
 - 7.3.2.2.2. By Application
 - 7.3.2.2.3. By Animal Type
- 7.3.3. Canada Veterinary Reference Laboratory Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Services Type
 - 7.3.3.2.2. By Application
 - 7.3.3.2.3. By Animal Type

8. SOUTH AMERICA VETERINARY REFERENCE LABORATORY MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Services Type
 - 8.2.2. By Application
 - 8.2.3. By Animal Type
 - 8.2.4. By Country
- 8.3. South America: Country Analysis
 - 8.3.1. Brazil Veterinary Reference Laboratory Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Services Type
 - 8.3.1.2.2. By Application
 - 8.3.1.2.3. By Animal Type
 - 8.3.2. Argentina Veterinary Reference Laboratory Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value

- 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Services Type
 - 8.3.2.2.2. By Application
 - 8.3.2.2.3. By Animal Type
- 8.3.3. Colombia Veterinary Reference Laboratory Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Services Type
 - 8.3.3.2.2. By Application
 - 8.3.3.2.3. By Animal Type

9. MIDDLE EAST AND AFRICA VETERINARY REFERENCE LABORATORY MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Services Type
 - 9.2.2. By Application
 - 9.2.3. By Animal Type
 - 9.2.4. By Country
- 9.3. MEA: Country Analysis
 - 9.3.1. South Africa Veterinary Reference Laboratory Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Services Type
 - 9.3.1.2.2. By Application
 - 9.3.1.2.3. By Animal Type
 - 9.3.2. Saudi Arabia Veterinary Reference Laboratory Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Services Type
 - 9.3.2.2.2. By Application
 - 9.3.2.2.3. By Animal Type
 - 9.3.3. UAE Veterinary Reference Laboratory Market Outlook
 - 9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Services Type

9.3.3.2.2. By Application

9.3.3.2.3. By Animal Type

10. MARKET DYNAMICS

10.1. Drivers

10.2. Challenges

11. MARKET TRENDS & DEVELOPMENTS

11.1. Recent Developments

11.2. Product Launches

11.3. Mergers & Acquisitions

12. GLOBAL VETERINARY REFERENCE LABORATORY MARKET: SWOT ANALYSIS

13. PORTER'S FIVE FORCES ANALYSIS

13.1. Competition in the Industry

13.2. Potential of New Entrants

13.3. Power of Suppliers

13.4. Power of Customers

13.5. Threat of Substitute Product

14. COMPETITIVE LANDSCAPE

14.1. IDEXX Laboratories, Inc.

14.1.1. Business Overview

14.1.2. Company Snapshot

14.1.3. Product & Services

14.1.5. Financials (In case of listed)

14.1.6. Recent Developments

14.1.7. SWOT Analysis

14.2. VCA, Inc.

14.3. GD Animal Health

- 14.4. Zoetis Inc.
- 14.5. NEOGEN Corporation
- 14.6. LABOKLIN GmbH
- 14.7. SYNLAB International GmbH
- 14.8. Heska Corporation
- 14.9. Virbac inc.
- 14.10. Vaxxinova GmbH
- 14.11. Thermo Fisher Scientific, Inc

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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