

# **Companion Animal Diagnostics Market Size and Forecasts (2020 - 2030), Global and Regional Share, Trends, and Growth Opportunity Analysis Report Coverage: By Technique (Immunodiagnostics, Clinical Biochemistry, Molecular Diagnostics, Urinalysis, Hematology, and Others), Product (Instruments and Consumables), Application (Bacteriology, Clinical Pathology, Virology, Parasitology, and Others), Companion Animal Type (Dogs, Cats, Horses, and Others), End User (Diagnostic Laboratories, Veterinary Hospitals and Clinics, Research Institutes, and Others), and Geography (North America, Europe, Asia Pacific, South & Central America, and Middle East & Africa)**

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## **Abstracts**

The companion animal diagnostics market is expected to grow from US\$ 3.139 billion in 2022 to US\$ 6.303 billion by 2030; it is anticipated to record a CAGR of 9.1% from 2022 to 2030.

The companion animal diagnostics products takes care of the diagnosis of different of diseases in the pet animals. These products deals with the epidemiology and pathogenesis of the domestic animal and prevents further complications with health of the pet as well as the owner. These products are normally used for the animals like

cats, dogs, horses. The companion animal diagnostics market size is expanding with the rising cases of infectious diseases and growing awareness about the use of point-of-care diagnostics for the detection of animal diseases. Point-of-care diagnostics (POCDs) are simple, rapid, and portable diagnostic devices that can detect the disease status at the field level. In recent years, real-time PCR (qPCR) has been transitioned into a POCD platform. These fully automated platforms combine nucleic acid extraction, thermal cycling, and on-site reporting results. For instance, MiniLab from Enigma Diagnostics is a molecular diagnostic platform of 10–35 kg that is carried at the field level and used for validating African swine fever virus, classical swine fever virus, avian influenza virus, and foot-and-mouth disease virus for research purposes. The genesig detection kits of Primerdesign Ltd, UK, supply lyophilized qPCR assay kits for the diagnosis of 62 bovine, 42 equine, 47 porcine, 60 avian, 40 canine, and 26 feline pathogens for research purposes.

### Upsurge in Pet Spending Drives the Growth the Companion Animal Diagnostics Market

A large number of pet owners spend significantly on animal healthcare, particularly on veterinary care, diagnostics, and pharmaceuticals. Pet wellness and preventive diagnostic testing is still in its early stages. Animals can suffer from chronic illnesses such as arthritis, cancer, and allergies, similar to humans. Chronic diseases in pets have become more prevalent, which has a significant impact on people's spending on their pets' well-being and health. According to estimates from the American Veterinary Medical Association, 1 in 4 dogs is likely to experience neoplasia at some point in its life. Moreover, nearly half of the dogs would develop cancer after the age of 10. According to the American Pet Products Association, Americans spent US\$ 136.8 billion on their pets in 2022, which was 10.68% higher than the amount spent in 2021 (US\$ 123.6 billion). Thus, the growing prevalence of chronic diseases has become a more significant factor in the increase in pet spending. For instance, according to HealthforAnimals globally, an estimated US\$ 4.6 billion was spent on companion animal diagnostics in 2022.

Figure: Pet Industry Expenditures in US, 2012–2021

Source: American Pet Products Association's 2021–2022 National Pet Owners Survey

The companion animal diagnostics market is divided on the basis of technique, product, application, companion animal type, end user, and geography. Based on technique, the companion animal diagnostics market is segmented into immunodiagnostics, clinical biochemistry, hematology, urinalysis, molecular diagnostics, and others. The

immunodiagnostics segment is sub-segmented into lateral flow assays, ELISA tests, allergen-specific immunodiagnostic tests, and immunoassay analyzers. The clinical biochemistry segment is further categorized into clinical chemistry analysis, glucose monitoring, and blood gas electrolyte analysis. Based on product, the companion animal diagnostics market is bifurcated into instruments and consumables. Based on application, the companion animal diagnostics market is segmented into bacteriology, clinical pathology, virology, parasitology, and others. Based on companion animal type, the companion animal diagnostics market is segmented into dogs, cats, horses, and others. Based on end user, the companion animal diagnostics market is segmented into diagnostic laboratories, veterinary hospitals and clinics, and research institutes and universities..

Based on geography, the market is segmented into North America, Europe, Asia Pacific, the Middle East & Africa, and South & Central America. North America held the largest market share of the companion animal diagnostics market. The growth of the market in the region is due to rising government support for research and development activities in veterinary medicine, growing technological advancements that are resulting in various market consolidations, and rising adoption of pet animals across countries in North America. In addition, the presence of various market leaders in the companion animal diagnostics market is projected to influence the market growth positively during the forecast period. The companion animal diagnostics market in the US is expected to be the largest in North America. The growth of the market in the country is determined by factors such as a technologically advanced team in research and development of the veterinary sector and the presence of numerous animal health centers. Besides this, an increase in the adoption rate of pet animals and rising concern about maintaining the health of pets further promote the market growth. According to the Humane Society of the United States, an estimated 69 million and 45.4 million households owned at least one dog and cat in 2021 and 2022, respectively. As per the American Pet Products Association, Americans spent US\$ 136.8 billion on their pets in 2022, a 10.68% increase from 2021 (i.e., US\$ 123.6 billion).

In the US, specific veterinary diagnostics are regulated and dependent on the US Department of Agriculture-Center for Veterinary Biologics (USDA-CVB) for approval. These involve veterinary diagnostic kits intended to diagnose pathogens in animals undergoing treatment. USDA-CVB are point-of-care diagnostics for testing feline leukemia virus (FeLV), canine parvovirus, canine heartworm, and other viruses. The National Veterinary Services Laboratories provide diagnostics services for animals, and it offers a wide range of diagnostic services and information centered around the diagnosis of domestic and foreign animal diseases. The laboratory is also involved in

the support of disease control and eradication programs. It produces reagents for diagnostic testing and offers training and laboratory certification. Similarly, there are presence other private laboratories affiliated to the American Association of Veterinary Laboratory Diagnosticians. For instance, the Wisconsin Veterinary Diagnostic Laboratory offers a broad range of diagnostic services to the production, companion, and exotic animal industries.

The presence of strong players in the US is further augmenting the market growth. For instance, Zoetis Inc. is among the market leaders involved in the development, manufacturing, and marketing of veterinary point-of-care diagnostic instruments and consumables. It also offers immunodiagnostic products to help detect viruses, bacteria, antibodies to viruses, and bacteria through antigen–antibody reactions.

The market for companion animal diagnostics in Canada is expected to grow due to the well-developed and well-structured healthcare system. The Canadian government supports the veterinary sector by implementing regulations for better services. For instance, under guidelines 4.10E of the Regulation of Veterinary Biologics in Canada, the Canadian Centre for Veterinary Biologics (CCVB) regulatory program for veterinary biologics (VB) has been implemented. The authority of the Health of Animals Act and Regulations imposed the program. The VB regulatory program aims to protect the health of Canadian animals, such as domestic livestock, poultry, companion animals, wildlife, and aquatic species. In addition, it aims to protect public health and food safety by controlling indigenous animal diseases and preventing the spread of foreign animal diseases.

Similarly, increasing initiatives by the Canadian government are further propelling the market growth in the country. For instance, Animal Health Canada is involved in strengthening Canada's capacity for animal disease prevention and animal health management. In addition, Antech Diagnostics, a division of Mars Petcare, has acquired Biovet, a Canadian biotechnology company that specializes in animal health and agro-industry diagnostics. The acquisition is expected to expand Antech Diagnostic's research capabilities and access for veterinarians throughout Canada. Furthermore, an increase in the prevalence of various zoonotic diseases, growing technological advancements, and increasing pet ownership are the factors propelling the market growth in Canada.

American Horse Council, Centers for Disease Control and Prevention (CDC), World Health Organization (WHO), and National Council of Societies for the Prevention of Cruelty to Animals (NSPCA) are a few key primary and secondary sources referred to

while preparing the report on the companion animal diagnostics market.

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