

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.

Contents

1. INTRODUCTION

- 1.1 The Insight Partners Research Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights

3. RESEARCH METHODOLOGY

- 3.1 Coverage
- 3.2 Secondary Research
- 3.3 Primary Research

4. COMPANION ANIMAL DIAGNOSTICS MARKET LANDSCAPE

- 4.1 Overview
- 4.2 PEST Analysis
 - 4.2.1 Global PEST Analysis

5. COMPANION ANIMAL DIAGNOSTICS MARKET - KEY INDUSTRY DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Increasing Adoption of Pets for Companionship
 - 5.1.2 Upsurge in Pet Spending
- 5.2 Market Restraints
 - 5.2.1 Lack of Skilled Professionals
- 5.3 Market Opportunities
 - 5.3.1 New Product Launches and Approvals
- 5.4 Future Trends
 - 5.4.1 Technological Advancements
- 5.5 Impact Analysis

6. COMPANION ANIMAL DIAGNOSTICS MARKET - GLOBAL MARKET ANALYSIS

- 6.1 Companion Animal Diagnostics Market Revenue (US\$ Mn), 2022 – 2030

7. GLOBAL COMPANION ANIMAL DIAGNOSTICS MARKET – REVENUE AND FORECAST TO 2030 – BY TECHNIQUE

7.1 Overview

7.2 Companion Animal Diagnostics Market Revenue Share, by Technique 2022 & 2030 (%)

7.3 Immunodiagnostics

7.3.1 Overview

7.3.2 Immunodiagnostics: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

7.3.2.1 Immunodiagnostics: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

7.4 Clinical Biochemistry

7.4.1 Overview

7.4.2 Clinical Biochemistry: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

7.4.2.1 Clinical Biochemistry: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

7.5 Molecular Diagnostics

7.5.1 Overview

7.5.2 Molecular Diagnostics: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

7.5.2.1 Molecular Diagnostics: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

7.6 Urinalysis

7.6.1 Overview

7.6.2 Urinalysis: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

7.7 Hematology

7.7.1 Overview

7.7.2 Hematology: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

7.8 Others

7.8.1 Overview

7.8.2 Others: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

8. GLOBAL COMPANION ANIMAL DIAGNOSTICS MARKET – REVENUE AND

FORECAST TO 2030 – BY PRODUCT

8.1 Overview

8.2 Companion Animal Diagnostics Market Revenue Share, by Product 2022 & 2030 (%)

8.3 Instruments

8.3.1 Overview

8.3.2 Instruments: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

8.4 Consumables

8.4.1 Overview

8.4.2 Consumables: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

9. GLOBAL COMPANION ANIMAL DIAGNOSTICS MARKET – REVENUE AND FORECAST TO 2030 – BY APPLICATION

9.1 Overview

9.2 Companion Animal Diagnostics Market Revenue Share, by Application 2022 & 2030 (%)

9.3 Bacteriology

9.3.1 Overview

9.3.2 Bacteriology: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

9.4 Clinical Pathology

9.4.1 Overview

9.4.2 Clinical Pathology: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

9.5 Virology

9.5.1 Overview

9.5.2 Virology: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

9.6 Parasitology

9.6.1 Overview

9.6.2 Parasitology: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

9.7 Others

9.7.1 Overview

9.7.2 Others: Companion Animal Diagnostics Market – Revenue and Forecast to 2030

(US\$ Million)

10. GLOBAL COMPANION ANIMAL DIAGNOSTICS MARKET – REVENUE AND FORECAST TO 2030 – BY COMPANION ANIMAL TYPE

10.1 Overview

10.2 Companion Animal Diagnostics Market Revenue Share, by Companion Animal Type 2022 & 2030 (%)

10.3 Dogs

10.3.1 Overview

10.3.2 Dogs: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

10.4 Cats

10.4.1 Overview

10.4.2 Cats: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

10.5 Horses

10.5.1 Overview

10.5.2 Horses: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

10.6 Others

10.6.1 Overview

10.6.2 Others: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

11. GLOBAL COMPANION ANIMAL DIAGNOSTICS MARKET – REVENUE AND FORECAST TO 2030 – BY END USER

11.1 Overview

11.2 Companion Animal Diagnostics Market Revenue Share, by End User 2022 & 2030 (%)

11.3 Diagnostic Laboratories

11.3.1 Overview

11.3.2 Diagnostic Laboratories: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

11.4 Veterinary Hospitals and Clinics

11.4.1 Overview

11.4.2 Veterinary Hospitals and Clinics: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

11.5 Research Institutes

11.5.1 Overview

11.5.2 Research Institutes: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

11.6 Others

11.6.1 Overview

11.6.2 Others: Companion Animal Diagnostics Market – Revenue and Forecast to 2030 (US\$ Million)

12. COMPANION ANIMAL DIAGNOSTICS MARKET - GEOGRAPHICAL ANALYSIS

12.1 North America Companion Animal Diagnostics Market, Revenue And Forecast To 2030

12.1.1 Overview

12.1.2 North America Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.1.3 North America Companion Animal Diagnostics Market, by Technique

12.1.3.1 North America: Companion Animal Diagnostics Market, by Immunodiagnosics, 2020–2030 (US\$ Million)

12.1.3.2 North America: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.1.3.3 North America: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.1.4 North America Companion Animal Diagnostics Market, by Product

12.1.5 North America Companion Animal Diagnostics Market, by Application

12.1.6 North America Companion Animal Diagnostics Market, by Companion Animal Type

12.1.7 North America Companion Animal Diagnostics Market, by End User

12.1.8 North America Companion Animal Diagnostics Market, by Country

12.1.8.1 US

12.1.8.1.1 Overview

12.1.8.1.2 US Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.1.8.1.3 US Companion Animal Diagnostics Market, by Technique

12.1.8.1.3.1 US: Companion Animal Diagnostics Market, by Immunodiagnosics, 2020–2030 (US\$ Million)

12.1.8.1.3.2 US: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.1.8.1.3.3 US: Companion Animal Diagnostics Market, by Molecular Diagnostics,

2020–2030 (US\$ Million)

12.1.8.1.4 US Companion Animal Diagnostics Market, by Product

12.1.8.1.5 US Companion Animal Diagnostics Market, by Application

12.1.8.1.6 US Companion Animal Diagnostics Market, by Companion Animal Type

12.1.8.1.7 US Companion Animal Diagnostics Market, by End User

12.1.8.2 Canada

12.1.8.2.1 Overview

12.1.8.2.2 Canada Companion Animal Diagnostics Market Revenue and Forecast to

2030 (US\$ Mn)

12.1.8.2.3 Canada Companion Animal Diagnostics Market, by Technique

12.1.8.2.3.1 Canada: Companion Animal Diagnostics Market, by
Immunodiagnosics, 2020–2030 (US\$ Million)

12.1.8.2.3.2 Canada: Companion Animal Diagnostics Market, by Clinical
Biochemistry, 2020–2030 (US\$ Million)

12.1.8.2.3.3 Canada: Companion Animal Diagnostics Market, by Molecular
Diagnostics, 2020–2030 (US\$ Million)

12.1.8.2.4 Canada Companion Animal Diagnostics Market, by Product

12.1.8.2.5 Canada Companion Animal Diagnostics Market, by Application

12.1.8.2.6 Canada Companion Animal Diagnostics Market, by Companion Animal

Type

12.1.8.2.7 Canada Companion Animal Diagnostics Market, by End User

12.1.8.3 Mexico

12.1.8.3.1 Overview

12.1.8.3.2 Mexico Companion Animal Diagnostics Market Revenue and Forecast to

2030 (US\$ Mn)

12.1.8.3.3 Mexico Companion Animal Diagnostics Market, by Technique

12.1.8.3.3.1 Mexico: Companion Animal Diagnostics Market, by
Immunodiagnosics, 2020–2030 (US\$ Million)

12.1.8.3.3.2 Mexico: Companion Animal Diagnostics Market, by Clinical
Biochemistry, 2020–2030 (US\$ Million)

12.1.8.3.3.3 Mexico: Companion Animal Diagnostics Market, by Molecular
Diagnostics, 2020–2030 (US\$ Million)

12.1.8.3.4 Mexico Companion Animal Diagnostics Market, by Product

12.1.8.3.5 Mexico Companion Animal Diagnostics Market, by Application

12.1.8.3.6 Mexico Companion Animal Diagnostics Market, by Companion Animal

Type

12.1.8.3.7 Mexico Companion Animal Diagnostics Market, by End User

12.2 Europe Companion Animal Diagnostics Market, Revenue and Forecast to 2030

12.2.1 Overview

12.2.2 Europe Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.2.3 Europe Companion Animal Diagnostics Market, by Technique

12.2.3.1 Europe: Companion Animal Diagnostics Market, by Immunodiagnostics, 2020–2030 (US\$ Million)

12.2.3.2 Europe: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.2.3.3 Europe: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.2.4 Europe Companion Animal Diagnostics Market, by Product

12.2.5 Europe Companion Animal Diagnostics Market, by Application

12.2.6 Europe Companion Animal Diagnostics Market, by Companion Animal Type

12.2.7 Europe Companion Animal Diagnostics Market, by End User

12.2.8 Europe Companion Animal Diagnostics Market by Country

12.2.8.1 Germany

12.2.8.1.1 Overview

12.2.8.1.2 Germany Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.2.8.1.3 Germany Companion Animal Diagnostics Market, by Technique

12.2.8.1.3.1 Germany: Companion Animal Diagnostics Market, by Immunodiagnostics, 2020–2030 (US\$ Million)

12.2.8.1.3.2 Germany: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.2.8.1.3.3 Germany: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.2.8.1.4 Germany Companion Animal Diagnostics Market, by Product

12.2.8.1.5 Germany Companion Animal Diagnostics Market, by Application

12.2.8.1.6 Germany Companion Animal Diagnostics Market, by Companion Animal Type

12.2.8.1.7 Germany Companion Animal Diagnostics Market, by End User

12.2.8.2 UK

12.2.8.2.1 Overview

12.2.8.2.2 UK Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.2.8.2.3 UK Companion Animal Diagnostics Market, by Technique

12.2.8.2.3.1 UK: Companion Animal Diagnostics Market, by Immunodiagnostics, 2020–2030 (US\$ Million)

12.2.8.2.3.2 UK: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.2.8.2.3.3 UK: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.2.8.2.4 UK Companion Animal Diagnostics Market, by Product

12.2.8.2.5 UK Companion Animal Diagnostics Market, by Application

12.2.8.2.6 UK Companion Animal Diagnostics Market, by Companion Animal Type

12.2.8.2.7 UK Companion Animal Diagnostics Market, by End User

12.2.8.3 France

12.2.8.3.1 Overview

12.2.8.3.2 France Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.2.8.3.3 France Companion Animal Diagnostics Market, by Technique

12.2.8.3.3.1 France: Companion Animal Diagnostics Market, by Immunodiagnosics, 2020–2030 (US\$ Million)

12.2.8.3.3.2 France: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.2.8.3.3.3 France: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.2.8.3.4 France Companion Animal Diagnostics Market, by Product

12.2.8.3.5 France Companion Animal Diagnostics Market, by Application

12.2.8.3.6 France Companion Animal Diagnostics Market, by Companion Animal Type

12.2.8.3.7 France Companion Animal Diagnostics Market, by End User

12.2.8.4 Italy

12.2.8.4.1 Overview

12.2.8.4.2 Italy Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.2.8.4.3 Italy Companion Animal Diagnostics Market, by Technique

12.2.8.4.3.1 Italy: Companion Animal Diagnostics Market, by Immunodiagnosics, 2020–2030 (US\$ Million)

12.2.8.4.3.2 Italy: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.2.8.4.3.3 Italy: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.2.8.4.4 Italy Companion Animal Diagnostics Market, by Product

12.2.8.4.5 Italy Companion Animal Diagnostics Market, by Application

12.2.8.4.6 Italy Companion Animal Diagnostics Market, by Companion Animal Type

12.2.8.4.7 Italy Companion Animal Diagnostics Market, by End User

12.2.8.5 Spain

12.2.8.5.1 Overview

12.2.8.5.2 Spain Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.2.8.5.3 Spain Companion Animal Diagnostics Market, by Technique

12.2.8.5.3.1 Spain: Companion Animal Diagnostics Market, by Immunodiagnostics, 2020–2030 (US\$ Million)

12.2.8.5.3.2 Spain: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.2.8.5.3.3 Spain: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.2.8.5.4 Spain Companion Animal Diagnostics Market, by Product

12.2.8.5.5 Spain Companion Animal Diagnostics Market, by Application

12.2.8.5.6 Spain Companion Animal Diagnostics Market, by Companion Animal Type

12.2.8.5.7 Spain Companion Animal Diagnostics Market, by End User

12.2.8.6 Rest of Europe

12.2.8.6.1 Overview

12.2.8.6.2 Rest of Europe Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.2.8.6.3 Rest of Europe Companion Animal Diagnostics Market, by Technique

12.2.8.6.3.1 Rest of Europe: Companion Animal Diagnostics Market, by Immunodiagnostics, 2020–2030 (US\$ Million)

12.2.8.6.3.2 Rest of Europe: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.2.8.6.3.3 Rest of Europe: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.2.8.6.4 Rest of Europe Companion Animal Diagnostics Market, by Product

12.2.8.6.5 Rest of Europe Companion Animal Diagnostics Market, by Application

12.2.8.6.6 Rest of Europe Companion Animal Diagnostics Market, by Companion Animal Type

12.2.8.6.7 Rest of Europe Companion Animal Diagnostics Market, by End User

12.3 Asia Pacific Companion Animal Diagnostics Market, Revenue And Forecast to 2030

12.3.1 Overview

12.3.2 Asia Pacific Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.3.3 Asia Pacific Companion Animal Diagnostics Market, by Technique

12.3.3.1 Asia Pacific: Companion Animal Diagnostics Market, by Immunodiagnostics, 2020–2030 (US\$ Million)

12.3.3.2 Asia Pacific: Companion Animal Diagnostics Market, by Clinical

Biochemistry, 2020–2030 (US\$ Million)

12.3.3.3 Asia Pacific: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.3.4 Asia Pacific Companion Animal Diagnostics Market, by Product

12.3.5 Asia Pacific Companion Animal Diagnostics Market, by Application

12.3.6 Asia Pacific Companion Animal Diagnostics Market, by Companion Animal Type

12.3.7 Asia Pacific Companion Animal Diagnostics Market, by End User

12.3.8 Asia Pacific Companion Animal Diagnostics Market by Country

12.3.8.1 China

12.3.8.1.1 Overview

12.3.8.1.2 China Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.3.8.1.3 China Companion Animal Diagnostics Market, by Technique

12.3.8.1.3.1 China: Companion Animal Diagnostics Market, by Immunodiagnostics, 2020–2030 (US\$ Million)

12.3.8.1.3.2 China: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.3.8.1.3.3 China: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.3.8.1.4 China Companion Animal Diagnostics Market, by Product

12.3.8.1.5 China Companion Animal Diagnostics Market, by Application

12.3.8.1.6 China Companion Animal Diagnostics Market, by Companion Animal Type

12.3.8.1.7 China Companion Animal Diagnostics Market, by End User

12.3.8.2 Japan

12.3.8.2.1 Overview

12.3.8.2.2 Japan Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.3.8.2.3 Japan Companion Animal Diagnostics Market, by Technique

12.3.8.2.3.1 Japan: Companion Animal Diagnostics Market, by Immunodiagnostics, 2020–2030 (US\$ Million)

12.3.8.2.3.2 Japan: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.3.8.2.3.3 Japan: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.3.8.2.4 Japan Companion Animal Diagnostics Market, by Product

12.3.8.2.5 Japan Companion Animal Diagnostics Market, by Application

12.3.8.2.6 Japan Companion Animal Diagnostics Market, by Companion Animal

Type

12.3.8.2.7 Japan Companion Animal Diagnostics Market, by End User

12.3.8.3 India

12.3.8.3.1 Overview

12.3.8.3.2 India Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.3.8.3.3 India Companion Animal Diagnostics Market, by Technique

12.3.8.3.3.1 India: Companion Animal Diagnostics Market, by Immunodiagnostics, 2020–2030 (US\$ Million)

12.3.8.3.3.2 India: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.3.8.3.3.3 India: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.3.8.3.4 India Companion Animal Diagnostics Market, by Product

12.3.8.3.5 India Companion Animal Diagnostics Market, by Application

12.3.8.3.6 India Companion Animal Diagnostics Market, by Companion Animal Type

12.3.8.3.7 India Companion Animal Diagnostics Market, by End User

12.3.8.4 Australia

12.3.8.4.1 Overview

12.3.8.4.2 Australia Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.3.8.4.3 Australia Companion Animal Diagnostics Market, by Technique

12.3.8.4.3.1 Australia: Companion Animal Diagnostics Market, by Immunodiagnostics, 2020–2030 (US\$ Million)

12.3.8.4.3.2 Australia: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.3.8.4.3.3 Australia: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.3.8.4.4 Australia Companion Animal Diagnostics Market, by Product

12.3.8.4.5 Australia Companion Animal Diagnostics Market, by Application

12.3.8.4.6 Australia Companion Animal Diagnostics Market, by Companion Animal

Type

12.3.8.4.7 Australia Companion Animal Diagnostics Market, by End User

12.3.8.5 South Korea

12.3.8.5.1 Overview

12.3.8.5.2 South Korea Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.3.8.5.3 South Korea Companion Animal Diagnostics Market, by Technique

12.3.8.5.3.1 South Korea: Companion Animal Diagnostics Market, by

Immunodiagnosics, 2020–2030 (US\$ Million)

12.3.8.5.3.2 South Korea: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.3.8.5.3.3 South Korea: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.3.8.5.4 South Korea Companion Animal Diagnostics Market, by Product

12.3.8.5.5 South Korea Companion Animal Diagnostics Market, by Application

12.3.8.5.6 South Korea Companion Animal Diagnostics Market, by Companion Animal Type

12.3.8.5.7 South Korea Companion Animal Diagnostics Market, by End User

12.3.8.6 Rest of Asia Pacific

12.3.8.6.1 Overview

12.3.8.6.2 Rest of Asia Pacific Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.3.8.6.3 Rest of Asia Pacific Companion Animal Diagnostics Market, by Technique

12.3.8.6.3.1 Rest of Asia Pacific: Companion Animal Diagnostics Market, by Immunodiagnosics, 2020–2030 (US\$ Million)

12.3.8.6.3.2 Rest of Asia Pacific: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.3.8.6.3.3 Rest of Asia Pacific: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.3.8.6.4 Rest of Asia Pacific Companion Animal Diagnostics Market, by Product

12.3.8.6.5 Rest of Asia Pacific Companion Animal Diagnostics Market, by Application

12.3.8.6.6 Rest of Asia Pacific Companion Animal Diagnostics Market, by Companion Animal Type

12.3.8.6.7 Rest of Asia Pacific Companion Animal Diagnostics Market, by End User
12.4 Middle East & Africa Companion Animal Diagnostics Market, Revenue And Forecast to 2030

12.4.1 Overview

12.4.2 Middle East & Africa Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.4.3 Middle East & Africa Companion Animal Diagnostics Market, by Technique

12.4.3.1 Middle East & Africa: Companion Animal Diagnostics Market, by Immunodiagnosics, 2020–2030 (US\$ Million)

12.4.3.2 Middle East & Africa: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.4.3.3 Middle East & Africa: Companion Animal Diagnostics Market, by Molecular

Diagnostics, 2020–2030 (US\$ Million)

12.4.4 Middle East & Africa Companion Animal Diagnostics Market, by Product

12.4.5 Middle East & Africa Companion Animal Diagnostics Market, by Application

12.4.6 Middle East & Africa Companion Animal Diagnostics Market, by Companion Animal Type

12.4.7 Middle East & Africa Companion Animal Diagnostics Market, by End User

12.4.8 Middle East & Africa Companion Animal Diagnostics Market by Country

12.4.8.1 South Africa

12.4.8.1.1 Overview

12.4.8.1.2 South Africa Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.4.8.1.3 South Africa Companion Animal Diagnostics Market, by Technique

12.4.8.1.3.1 South Africa: Companion Animal Diagnostics Market, by Immunodiagnosics, 2020–2030 (US\$ Million)

12.4.8.1.3.2 South Africa: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.4.8.1.3.3 South Africa: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.4.8.1.4 South Africa Companion Animal Diagnostics Market, by Product

12.4.8.1.5 South Africa Companion Animal Diagnostics Market, by Application

12.4.8.1.6 South Africa Companion Animal Diagnostics Market, by Companion Animal Type

12.4.8.1.7 South Africa Companion Animal Diagnostics Market, by End User

12.4.8.2 Saudi Arabia

12.4.8.2.1 Overview

12.4.8.2.2 Saudi Arabia Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.4.8.2.3 Saudi Arabia Companion Animal Diagnostics Market, by Technique

12.4.8.2.3.1 Saudi Arabia: Companion Animal Diagnostics Market, by Immunodiagnosics, 2020–2030 (US\$ Million)

12.4.8.2.3.2 Saudi Arabia: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.4.8.2.3.3 Saudi Arabia: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.4.8.2.4 Saudi Arabia Companion Animal Diagnostics Market, by Product

12.4.8.2.5 Saudi Arabia Companion Animal Diagnostics Market, by Application

12.4.8.2.6 Saudi Arabia Companion Animal Diagnostics Market, by Companion Animal Type

12.4.8.2.7 Saudi Arabia Companion Animal Diagnostics Market, by End User

12.4.8.3 UAE

12.4.8.3.1 Overview

12.4.8.3.2 UAE Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.4.8.3.3 UAE Companion Animal Diagnostics Market, by Technique

12.4.8.3.3.1 UAE: Companion Animal Diagnostics Market, by Immunodiagnostics, 2020–2030 (US\$ Million)

12.4.8.3.3.2 UAE: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.4.8.3.3.3 UAE: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.4.8.3.4 UAE Companion Animal Diagnostics Market, by Product

12.4.8.3.5 UAE Companion Animal Diagnostics Market, by Application

12.4.8.3.6 UAE Companion Animal Diagnostics Market, by Companion Animal Type

12.4.8.3.7 UAE Companion Animal Diagnostics Market, by End User

12.4.8.4 Rest of Middle East & Africa

12.4.8.4.1 Overview

12.4.8.4.2 Rest of Middle East & Africa Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.4.8.4.3 Rest of Middle East & Africa Companion Animal Diagnostics Market, by Technique

12.4.8.4.3.1 Rest of Middle East & Africa: Companion Animal Diagnostics Market, by Immunodiagnostics, 2020–2030 (US\$ Million)

12.4.8.4.3.2 Rest of Middle East & Africa: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.4.8.4.3.3 Rest of Middle East & Africa: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.4.8.4.4 Rest of Middle East & Africa Companion Animal Diagnostics Market, by Product

12.4.8.4.5 Rest of Middle East & Africa Companion Animal Diagnostics Market, by Application

12.4.8.4.6 Rest of Middle East & Africa Companion Animal Diagnostics Market, by Companion Animal Type

12.4.8.4.7 Rest of Middle East & Africa Companion Animal Diagnostics Market, by End User

12.5 South & Central America Companion Animal Diagnostics Market, Revenue And Forecast to 2030

12.5.1 Overview

12.5.2 South & Central America Companion Animal Diagnostics Market Revenue and

Forecast to 2030 (US\$ Mn)

12.5.3 South & Central America Companion Animal Diagnostics Market, by Technique

12.5.3.1 South & Central America: Companion Animal Diagnostics Market, by Immunodiagnosics, 2020–2030 (US\$ Million)

12.5.3.2 South & Central America: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.5.3.3 South & Central America: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.5.4 South & Central America Companion Animal Diagnostics Market, by Product

12.5.5 South & Central America Companion Animal Diagnostics Market, by Application

12.5.6 South & Central America Companion Animal Diagnostics Market, by Companion Animal Type

12.5.7 South & Central America Companion Animal Diagnostics Market, by End User

12.5.8 South & Central America Companion Animal Diagnostics Market by Country.

12.5.8.1 Brazil

12.5.8.1.1 Overview

12.5.8.1.2 Brazil Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.5.8.1.3 Brazil Companion Animal Diagnostics Market, by Technique

12.5.8.1.3.1 Brazil: Companion Animal Diagnostics Market, by Immunodiagnosics, 2020–2030 (US\$ Million)

12.5.8.1.3.2 Brazil: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.5.8.1.3.3 Brazil: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.5.8.1.4 Brazil Companion Animal Diagnostics Market, by Product

12.5.8.1.5 Brazil Companion Animal Diagnostics Market, by Application

12.5.8.1.6 Brazil Companion Animal Diagnostics Market, by Companion Animal Type

12.5.8.1.7 Brazil Companion Animal Diagnostics Market, by End User

12.5.8.2 Argentina

12.5.8.2.1 Overview

12.5.8.2.2 Argentina Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.5.8.2.3 Argentina Companion Animal Diagnostics Market, by Technique

12.5.8.2.3.1 Argentina: Companion Animal Diagnostics Market, by Immunodiagnosics, 2020–2030 (US\$ Million)

12.5.8.2.3.2 Argentina: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.5.8.2.3.3 Argentina: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.5.8.2.4 Argentina Companion Animal Diagnostics Market, by Product

12.5.8.2.5 Argentina Companion Animal Diagnostics Market, by Application

12.5.8.2.6 Argentina Companion Animal Diagnostics Market, by Companion Animal Type

12.5.8.2.7 Argentina Companion Animal Diagnostics Market, by End User

12.5.8.3 Rest of South & Central America

12.5.8.3.1 Overview

12.5.8.3.2 Rest of South & Central America Companion Animal Diagnostics Market Revenue and Forecast to 2030 (US\$ Mn)

12.5.8.3.3 Rest of South & Central America Companion Animal Diagnostics Market, by Technique

12.5.8.3.3.1 Rest of South & Central America: Companion Animal Diagnostics Market, by Immunodiagnostics, 2020–2030 (US\$ Million)

12.5.8.3.3.2 Rest of South & Central America: Companion Animal Diagnostics Market, by Clinical Biochemistry, 2020–2030 (US\$ Million)

12.5.8.3.3.3 Rest of South & Central America: Companion Animal Diagnostics Market, by Molecular Diagnostics, 2020–2030 (US\$ Million)

12.5.8.3.4 Rest of South & Central America Companion Animal Diagnostics Market, by Product

12.5.8.3.5 Rest of South & Central America Companion Animal Diagnostics Market, by Application

12.5.8.3.6 Rest of South & Central America Companion Animal Diagnostics Market, by Companion Animal Type

12.5.8.3.7 Rest of South & Central America Companion Animal Diagnostics Market, by End User

13. COMPANION ANIMAL DIAGNOSTICS MARKET INDUSTRY LANDSCAPE

13.1 Overview

13.1.1 Recent Developments

14. COMPANY PROFILES

14.1 Demeditec Diagnostics GmbH

14.1.1 Key Facts

14.1.2 Business Description

14.1.3 Products and Services

- 14.1.4 Financial Overview
- 14.1.5 SWOT Analysis
- 14.1.6 Key Developments
- 14.2 ARI Medical Technology Co Ltd
 - 14.2.1 Key Facts
 - 14.2.2 Business Description
 - 14.2.3 Products and Services
 - 14.2.4 Financial Overview
 - 14.2.5 SWOT Analysis
 - 14.2.6 Key Developments
- 14.3 Tianjin LOCMEDT Technologies Co Ltd
 - 14.3.1 Key Facts
 - 14.3.2 Business Description
 - 14.3.3 Products and Services
 - 14.3.4 Financial Overview
 - 14.3.5 SWOT Analysis
 - 14.3.6 Key Developments
- 14.4 Heska Corp
 - 14.4.1 Key Facts
 - 14.4.2 Business Description
 - 14.4.3 Products and Services
 - 14.4.4 Financial Overview
 - 14.4.5 SWOT Analysis
 - 14.4.6 Key Developments
- 14.5 Innovative Diagnostics SAS
 - 14.5.1 Key Facts
 - 14.5.2 Business Description
 - 14.5.3 Products and Services
 - 14.5.4 Financial Overview
 - 14.5.5 SWOT Analysis
 - 14.5.6 Key Developments
- 14.6 i-SENS Inc
 - 14.6.1 Key Facts
 - 14.6.2 Business Description
 - 14.6.3 Products and Services
 - 14.6.4 Financial Overview
 - 14.6.5 SWOT Analysis
 - 14.6.6 Key Developments
- 14.7 Universal Biosensors Inc

- 14.7.1 Key Facts
- 14.7.2 Business Description
- 14.7.3 Products and Services
- 14.7.4 Financial Overview
- 14.7.5 SWOT Analysis
- 14.7.6 Key Developments
- 14.8 Immunology Consultants Laboratory Inc
 - 14.8.1 Key Facts
 - 14.8.2 Business Description
 - 14.8.3 Products and Services
 - 14.8.4 Financial Overview
 - 14.8.5 SWOT Analysis
 - 14.8.6 Key Developments
- 14.9 Zoetis Inc
 - 14.9.1 Key Facts
 - 14.9.2 Business Description
 - 14.9.3 Products and Services
 - 14.9.4 Financial Overview
 - 14.9.5 SWOT Analysis
 - 14.9.6 Key Developments
- 14.10 Elabscience Biotechnology Inc
 - 14.10.1 Key Facts
 - 14.10.2 Business Description
 - 14.10.3 Products and Services
 - 14.10.4 Financial Overview
 - 14.10.5 SWOT Analysis
 - 14.10.6 Key Developments

15. APPENDIX

- 15.1 About Us
- 15.2 Glossary of Terms

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