

# Middle East & Africa Companion Animal Diagnostics Market Size and Forecast (2021 - 2031)

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## Abstracts

The companion animal diagnostics market in the Middle East and Africa is poised for substantial growth, with projections indicating that the market size will escalate from approximately US\$ 98.6 million in 2024 to around US\$ 164.4 million by 2031. This growth trajectory reflects a compound annual growth rate (CAGR) of 7.7% from 2025 to 2031, driven by several key factors.

### Market Overview

The market is primarily segmented into several regions, including the UAE, Saudi Arabia, South Africa, and the broader Middle East and Africa. The growth in this sector is largely attributed to the increasing rates of pet ownership, heightened awareness regarding animal health, and significant investments in companion animal healthcare infrastructure. Notably, there is a marked trend towards adopting advanced diagnostic technologies and an increase in spending on veterinary services, particularly in nations like South Africa and the UAE.

The rise in disposable income, coupled with a growing interest among millennials—especially those in their 20s and 30s—in pet adoption, has fostered a vibrant pet culture globally. The COVID-19 pandemic has further accelerated this trend, as many households have turned to pet ownership during periods of remote work and social distancing. In South Africa, for instance, the perception of dog ownership has evolved from mere companionship to a more complex role that includes safety and security.

In Islamic countries, however, cats tend to be favored over dogs, with local breeds such as the Egyptian Mau gaining popularity. In the UAE, pets are increasingly viewed as status symbols, particularly among affluent individuals, which has contributed to the rising demand for high-quality veterinary services and diagnostics.

### Market Segmentation

The Middle East and Africa companion animal diagnostics market can be categorized

based on various criteria:

1. **By Product:** The market is divided into consumables and instruments, with consumables holding the largest market share in 2024.
2. **By Companion Animal:** This segment includes dogs, cats, horses, and others, where dogs are expected to dominate the market.
3. **By Technology:** The market is segmented into immunodiagnostics, molecular diagnostics, clinical biochemistry, hematology, urinalysis, and others, with immunodiagnostics leading in market share.
4. **By Application:** This includes clinical pathology, bacteriology, parasitology, virology, and others, with clinical pathology being the most significant segment.
5. **By End Users:** The market is categorized into diagnostic and reference laboratories, veterinary hospitals and clinics, research institutes, and others, with veterinary hospitals and clinics holding the largest share.

#### Market Dynamics

The global expenditure on veterinary healthcare is on the rise, with pet owners increasingly investing in various aspects of pet care, including food, pharmaceuticals, veterinary treatments, and insurance. In South Africa, for example, there has been a notable increase in investment in companion animal healthcare, which is driving demand for enhanced diagnostic services. A recent development includes the launch of the largest CT scanner for veterinary use at the University of Pretoria's Onderstepoort Veterinary Academic Hospital, which is expected to improve diagnostic accuracy and treatment outcomes for pets.

Chronic diseases such as cancer, arthritis, and allergies are becoming more prevalent in pets, mirroring trends seen in human health. This has led to increased spending by pet owners on their animals' health and well-being. According to HealthforAnimals, an estimated US\$ 4.6 billion was spent globally on companion animal diagnostics in 2022, highlighting the growing importance of veterinary health awareness.

#### Regional Insights

The UAE stands out as a leader in the companion animal diagnostics market within the region. The country is witnessing a cultural shift towards animal welfare and luxury pet care, particularly among affluent Emirati families and expatriates. This trend is driving demand for advanced diagnostic services that ensure pets receive top-tier healthcare. Veterinary facilities in the UAE are equipped with cutting-edge technology that allows for rapid and accurate diagnoses, including genetic testing and comprehensive pathology services. The UAE's commitment to stringent health regulations and compliance with international veterinary standards further enhances its reputation as a reliable supplier of healthy livestock products.

The growth in pet ownership in the UAE has been significant, with a reported 30% increase in pet ownership. By 2025, the pet care sector in the Middle East and North

Africa is expected to reach US\$ 2 billion, driven by changing lifestyles and increased spending on pet health and grooming.

#### Conclusion

The companion animal diagnostics market in the Middle East and Africa is on an upward trajectory, fueled by rising pet ownership, increased awareness of animal health, and advancements in veterinary technology. As the market continues to evolve, it presents numerous opportunities for growth and innovation, particularly in regions like the UAE and South Africa, where pet care is becoming an integral part of lifestyle choices.

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