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# Middle East & Africa Veterinary Diagnostics Market Forecast to 2030 - Regional Analysis - by Product (Instruments and Consumables), Technology (Immunodiagnostics, Clinical Biochemistry, Hematology, Molecular Diagnostics, and Other Veterinary Diagnostic Technologies), Animal Type (Livestock Animals and Companion Animals), Disease Type (Infectious Diseases and Non-Infectious Diseases), and End User (Veterinary Hospitals & Clinics, Animal Diagnostic Laboratories, and Veterinary Research Institutes & Universities)

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## Abstracts

The Middle East & Africa veterinary diagnostics market was valued at US$ 214.82 million in 2022 and is expected to reach US$ 367.34 million by 2030; it is estimated to grow at a CAGR of 6.9% from 2022 to 2030.
Growing Ownership of Companion Animals Fuel the Middle East & Africa Veterinary Diagnostics Market
In recent years, increasing disposable income and growing interest of millennials, especially adults in their early 20s and late 30s, for pet adoption are supporting the pet culture across the globe. In addition, due to the onset of the COVID-19 pandemic, people were working from home and self-isolating; this change in lifestyle inspired households to own pets. Since there was no evidence that pets could contribute to the spread of COVID-19, people felt safe with an animal companion that provided mental and emotional support during the pandemic. South Africa is among the pet-friendly countries. The perception of people for owing dogs has changed in recent years, from

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keeping dogs for companionship to adopting them for safety purposes. However, cats are preferred to be kept as pets than dogs because Islam considers dogs to be unclean. A few regional cat breeds, such as the Egyptian Mau, are popular. Also, pets are considered a status symbol in the UAE, due to which they are becoming more popular among high-income earners. Thus, the pet adoption rate in the UAE is increasing. According to the Government of Canada, the pet population in the UAE has increased by around 10,000 animals each from 2016 to 2020, with the large dog population growing fastest by around 6,000 animals. According to Euromonitor International, households will continue to exit poverty and reach the middle class and thus, by 2040, 856 million households will have disposable incomes between US$ 15,000 and US$ 45,000, i.e., one in three households worldwide (35.5%). Due to increasing disposable income, companion animal adoption rates are growing. The advancement in the detecting animal diseases and increasing disposable income among pet owners drive the Middle East & Africa veterinary diagnostics market globally.

Middle East & Africa Veterinary Diagnostics Market Overview

The Middle East & Africa reported zoonotic disease outbreaks involving the Marburg virus in Tanzania (March 2023) and Ebola in Uganda in January 2023. These viruses proved highly contagious, causing severe illness, often associated with high mortality rates. Additionally, zoonotic pathogens continue to emerge and spread across the region, posing challenges related to mortality and morbidity, disrupting trade and the economy. Also, the Eastern region faces challenges in maintaining strong veterinary and public health systems. This is due to the Middle East & Africa being rich in biological diversity interactions between humans, domestic animals, and wild animals. Encroachment of natural habitats, poaching, and illegal wildlife trade increase the risk of zoonotic disease transmission. Therefore, there is a need for an "Integrated One Health Approach" to manage zoonotic disease transmission and emergence, ultimately to reduce risks of epidemics and pandemics, resulting in increased preparedness toward epidemics through animals. There is a need for multi-sectoral collaboration, public awareness, and strengthening community and risk mitigation applications to mitigate the risk of zoonotic diseases and protect ecosystems in East Africa. Also, USAID and GIZ in East Africa and TRAFFIC in Tanzania-a leading non-governmental organization to ensure trade in wild animals-undertake a comprehensive project to reduce zoonotic infections. Numerous zoonotic diseases have resulted in morbidity, mortality, and productivity losses in humans, livestock, and wildlife species in the Arabian Peninsula, causing social impacts. Typical outbreaks in the Arabian Peninsula involve Rift Valley Fever (RVF), Crimean-Congo hemorrhagic fever (CCHF), Avian Influenza, and Glanders. These zoonotic diseases have been introduced from other Arabian countries due to a lack of stringent import regulations or implementation. Therefore, there is an urgent need for interdisciplinary collaboration between the Arabian peninsula's health,

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agricultural, and environmental ministries to avoid the emergence and re-emergence of zoonotic diseases. This can be achieved by implementing a rapid information system between each country's responsible ministries and establishing efficient quarantine and veterinary laboratory facilities in each of the GCC countries. Also, the Mediterranean and the Middle East are known hubs for zoonoses. Therefore, the previously constructed Mediterranean Zoonoses Control Center can be widened with respect to reach in the Arabian Peninsula to control the zoonotic disease outbreak. Such support and initiatives from governments of various countries in the Middle East & Africa will ultimately accelerate the demand for veterinary diagnostics during 2022-2030.

Middle East & Africa Veterinary Diagnostics Market Revenue and Forecast to 2030 (US$ Million)

Middle East & Africa Veterinary Diagnostics Market Segmentation

The Middle East & Africa veterinary diagnostics market is segmented based on product, technology, disease type, animal type, end user, and country.

Based on product, the Middle East & Africa veterinary diagnostics market is bifurcated into instruments and consumables. The instruments segment held a larger share in 2022.

By technology, the Middle East & Africa veterinary diagnostics market is segmented into immunodiagnostics, clinical biochemistry, hematology, molecular diagnostics, and other veterinary diagnostic technologies. The immunodiagnostics segment held the largest share in 2022. The immunodiagnostics segment is further subsegmented into lateral flow assays, ELISA, immunoassay, allergen-specific immunodiagnostics test, and other immunodiagnostics. The clinical biochemistry segment is further subsegmented into clinical chemistry analysis, glucose monitoring, and blood gas and electrolyte.

By disease type, the Middle East & Africa veterinary diagnostics market is segmented into infectious diseases and non-infectious diseases. The infectious diseases segment held the largest share in 2022.

By animal type, the Middle East & Africa veterinary diagnostics market is bifurcated into livestock animals and companion animals. The companion animals segment held a larger share in 2022. The livestock animals segment is further subsegmented into cattle, pigs, poultry, and other livestock animals. The companion animals segment is further subsegmented into dogs, cats, horses, and other companion animals.

By end user, the Middle East & Africa veterinary diagnostics market is segmented into veterinary hospitals and clinics, animal diagnostic laboratories, and veterinary research institutes and universities. The companion animals segment held the largest share in 2022.

Based on country, the Middle East & Africa veterinary diagnostics market is segmented into South Africa, Saudi Arabia, the UAE, and the Rest of Middle East & Africa. South Africa dominated the Middle East & Africa veterinary diagnostics market in 2022.

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FUJIFILM Holdings Corp, Heska Corp, Idexx Laboratories Inc, Merck Animal Health, Neogen Corp, Randox Laboratories Ltd, Thermo Fisher Scientific Inc, Virbac SA, and Zoetis Inc are some of the leading companies operating in the Middle East & Africa veterinary diagnostics market.

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