

Veterinary Diagnostics Market Size and Forecast (2020-2030), Global and Regional Share, Trend, and Growth Opportunity Analysis Coverage: Product (Instruments and Consumables), Technology (Immunodiagnosics, Clinical Biochemistry, Hematology, Molecular Diagnostics, and Other Veterinary Diagnostic Technologies), Animal Type (Livestock Animals and Companion Animals), Disease Type (Infectious Diseases, Non-Infected Diseases, and Other Diseases), End User (Veterinary Hospitals & Clinics, Animal Diagnostic Laboratories, and Veterinary Research Institutes & Universities), and Geography (North America, Europe, Asia Pacific, South & Central America, and Middle East & Africa)

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Abstracts

The global veterinary diagnostics market size is expected to grow from US\$ 4.045 billion in 2022 to US\$ 7.270 billion by 2030; it is estimated to register a CAGR of 7.60% from 2022 to 2030.

The key factors driving the market's growth are rising prevalence of zoonotic diseases and, growing ownership of companion animals. However, lack of skilled veterinary research professionals may hinder the market growth.

Market Opportunities of Veterinary Diagnostics Market

The practice of veterinary medicine has undergone rapid change, allowing veterinarians to provide quicker diagnoses and more precise prognoses. Treatment techniques that were solely meant for humans are now utilized for treating companion animals. X-ray films have been replaced by digital radiographs, allowing digital communication, thorough assessment, and effective treatment. The advancement of digital dental X-rays and oral surgery instruments allow veterinarians to improve pets' oral health. Recent innovations focus on providing better care for pets, not just in clinics but also on improving overall preventive care. Wearables for animals are gaining significant traction to monitor the vitals such as body temperature, heart rate, respiration rate, and pH level. Further, wearable devices lead to better, quicker, and more accurate diagnoses and treatments. By using these technologies, pets can recover faster after surgery and return to normalcy in less time.

Similarly, 3D printing technology is instrumental in surgical procedures for animals. Veterinarians can have near-real information about the animal's interior skeletal and muscular systems undergoing surgery. The information gathered from computed tomography scans facilitates rapid prototyping, allowing for the creation of animal bone models. 3D printing technology used for manufacturing custom-designed prosthetics helps the animals regain mobility and improve their quality of life. Veterinary medicine has benefited from advances such as microchip fracture detection for broken bones and surgical monitoring devices, as well as laser eye surgery and oral pill cameras that capture 360-degree internal images when swallowed.

Thus, the growing technological advancements in the field of veterinary medicine provide more opportunities for the veterinary diagnostics market growth.

Factors Hampering Veterinary Diagnostics Market

Businesses in veterinary medicine seek candidates with advanced management skills to provide support in complex businesses. According to the US National Research Council Committee, veterinary research institutes and companies face challenges in maintaining the economic sustainability of veterinary practices and education to meet the transforming societal needs.

As of 2022, the American Veterinary Medical Association (AVMA) noted only 78,717 veterinarians registered for clinical practice in the US and 14,158 work as public/corporate employees. The country experiences a limited enrolment of students in

various veterinary research fields, such as pathology, toxicology, and laboratory animal medicine. Thus, the limited number of skilled professionals working in veterinary research hinders the growth of the veterinary diagnostics market.

Veterinary Diagnostics Market: Segmental Overview

By product, the veterinary diagnostics market is bifurcated into instruments and consumables. The instruments segment held a larger market share in 2022. The consumables segment is expected to record a significant CAGR during 2022–2030. Veterinary consumables involve testing tubes, containers, petri dishes, deep well plates, and kits comprising syringes, needles, safety lancets, IV sets & tubes, and samplers. These consumables are intended to be used for companion animal diagnostics, such as pet (canine, feline, and avian), bovine, goat, swine, equine, and poultry.

By technology, the global veterinary diagnostics market is segmented as immunodiagnosics, clinical biochemistry, hematology, molecular diagnostics, and other veterinary diagnostic technologies. The immunodiagnosics segment is further segmented as lateral flow assays, ELISA tests, immunoassay analyzers, allergen-specific immunodiagnostic tests, and other immunodiagnosics. Clinical biochemistry segment is further segmented as clinical chemistry analysis, glucose monitoring, blood gas & electrolytes. The immunodiagnosics segment held the largest market share in 2022 and is anticipated to register the highest CAGR during 2022–2030. The health of the animals is majorly associated with parasitic diseases. A parasite with a two-host prey–predator lifecycle acts as an intermediate host, causing some of the most devastating and prevalent diseases in humans and animals. As per the World Health Organization (WHO) 2023 report, about 1 billion cases of illness and millions of deaths occur annually from zoonoses. About 60% of emerging infectious diseases are reported globally, accounting for zoonoses. To overcome such a high prevalence of zoonotic infections, the demand for immunodiagnostic techniques is high among veterinarians. Cystic echinococcosis (CE) and Alveolar echinococcosis (AE) are severe zoonotic diseases caused by the larval stage (metacestode) of the Helminth *Echinococcus multilocularis*.

By animal type, the veterinary diagnostics market is bifurcated into livestock animals and companion animals. The livestock animals is further segmented as cattle, pigs, poultry, and other livestock animals. Companion animals is further segmented as dogs, cats, horses, and other companion animals. The companion animal segment held a larger share of the market in 2022 and is anticipated to register a higher CAGR during 2022–2030. Companion animals include dogs, cats, horses, and others. Companion

animals are a potential source of infectious disease for humans and food-producing animals. Newcastle disease epidemiology of neosporosis is a popular example of companion animals suffering from infectious diseases.

By disease type, the market is categorized into infectious diseases and non-infectious diseases. The infectious disease segment held a larger share of the market in 2022 and is anticipated to register a higher CAGR in the veterinary diagnostics market during 2022–2030.

By end user, the market is segmented as veterinary hospitals & clinics, animal diagnostic laboratories, and veterinary research institutes & universities. The veterinary hospitals & clinics segment held the largest share of the market in 2022 and is anticipated to register the highest CAGR in the veterinary diagnostics market during 2022–2030.

Veterinary Diagnostics Market: Geographical Overview

The North America veterinary diagnostics market is segmented into the US, Canada, and Mexico. The market growth in this region is attributed to the rising infectious animal diseases—a standalone factor positively influencing the growth of the market. Additionally, technological advancements in monitoring devices further enhances the overall market growth.

According to the Centers for Disease Control and Prevention (CDC) report, enteric diseases linked to animals are estimated to account for 450,000 illnesses, 5,000 hospitalizations, and 76 deaths in the US alone annually. Bacteria and parasites were the only types of etiologies reported. For example, 'Cryptosporidium' was the most common cause of confirmed, single-etiology outbreaks, accounting for 21 outbreaks in the US, followed by Salmonella with 18 (35%) in 2020. In the US, certain 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 the animal undergoing treatment. USDA-CVB are point-of-care diagnostics for testing feline leukemia virus (FeLV), canine parvovirus, canine heartworm, and other viruses).

Therefore, diagnostic methods are primarily involved in overcoming a high prevalence of animal infections. According to the American Association of Veterinary Laboratory Diagnosticians (AAVLD), at least 500 state and federally-funded pathologists and diagnosticians contribute to large animal herd health surveillance in the US and

Canada. Also, food animal-focused diagnostic laboratories received over US\$ 100 million to perform surveillance for studying a high-impact disease that may affect animal agriculture industries in 2020, as per the data retrieved from the Centers for Disease Control and Prevention (CDC). Therefore, early recognition of emerging pathogens can benefit in controlling animal disease infection and identifying potential zoonoses. Thus, the aforementioned factors positively influence the veterinary diagnostics market in North America.

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