

Veterinary Precision Medicine Market Size, Share and Growth Outlook 2026: By Type, By Animal Type, By Therapeutic Area, By Customer, Companies to 2034

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Abstracts

The global Veterinary Precision Medicine Market size is forecast to increase from \$689.15 Million in 2026 to \$1811.42 Million in 2034 at a CAGR of 12.84% between 2026 and 2034.

The Veterinary Precision Medicine market report provides detailed analysis and outlook of Veterinary Precision Medicine segments including By Type (Genomic Profiling and Sequencing, Diagnostic and Pathology, Precision Therapy and Treatment, Bioinformatics and Data Analytics), By Animal Type (Dogs, Cats, Horses, Production / Livestock Animals), By Therapeutic Area (Oncology, Infectious Diseases, Immunology and Autoimmune Disorders, Musculoskeletal Disorders, Cardiology and Neurology), By Customer (Veterinary Hospitals and Clinics, Veterinary Diagnostic Laboratories, Veterinary Academic and Research Institutions) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Veterinary Precision Medicine Industry Overview

Data-Driven Diagnostics Are Advancing Precision Animal Health

The global veterinary precision medicine industry is shifting toward individualized animal care supported by genomics, artificial intelligence, molecular diagnostics, and predictive disease profiling. Veterinary providers are increasingly using species-specific data and biomarker-driven tools to move beyond generalized diagnosis and treatment, enabling more accurate risk assessment, earlier disease detection, and targeted clinical decision making. This transition is especially important across companion animal oncology,

dental disease, inherited trait management, livestock productivity, and preventive healthcare. As animal health companies invest in high-throughput testing platforms and real-time diagnostic interpretation, precision veterinary medicine is becoming a core strategy for improving clinical outcomes, optimizing treatment selection, and supporting scalable data-driven care models across global veterinary markets.

Genomics and Artificial Intelligence Are Strengthening Personalized Veterinary Workflows

Industry investment is increasingly focused on technologies that convert molecular and imaging data into actionable clinical insights. Zoetis expanded its Precision Animal Health capabilities through the acquisition of Neogen Corporation's global animal genomics business, adding high-throughput genetic testing platforms and molecular data solutions for companion animal and livestock applications. In diagnostic imaging, Antech Diagnostics introduced RapidRead Dental for Feline, an artificial intelligence tool trained specifically on feline anatomy rather than adapted canine models. The system delivers real-time dental radiology interpretation within five minutes, helping veterinarians detect feline tooth resorption and design targeted preventive care plans. These developments show how precision medicine is integrating genomics and AI to improve patient-specific veterinary decision making.

Molecular Oncology Expands the Role of Targeted Veterinary Treatment

The market is also advancing through molecular diagnostic services that support personalized cancer management in companion animals. IDEXX Laboratories expanded its veterinary oncology portfolio with a molecular diagnostic service for canine mast cell tumors through IDEXX Reference Laboratories. The service analyzes cellular biomarkers, tumor grading, malignant potential, and genetic mutations to establish precise baseline profiles for veterinary oncologists. This approach enables more individualized treatment planning and better risk stratification for canine cancer patients. Combined with genomics acquisitions and species-specific AI diagnostics, molecular oncology highlights the industry's broader movement toward integrated precision veterinary ecosystems built around predictive testing, targeted therapies, and clinically actionable animal health data.

Veterinary Precision Medicine Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Veterinary Precision Medicine market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Zoetis Inc., Boehringer Ingelheim Animal Health, Merck Animal Health, Elanco Animal Health, IDEXX Laboratories, Inc., Ceva Santé Animale, Dechra Pharmaceuticals PLC, Virbac S.A., Vetoquinol S.A., Phibro Animal Health Corporation. The Veterinary Precision Medicine market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Veterinary Precision Medicine industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

Growth Veterinary Precision Medicine Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

Market Trends, Drivers, Potential Opportunities, and Challenges faced by Veterinary Precision Medicine companies

Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

Detailed SWOT Analysis of global and regional Veterinary Precision Medicine markets

Competitive analysis including business description, product analysis, and financial profiles

Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Veterinary Precision Medicine Market Competitive Benchmarking and Company

Veterinary Precision Medicine Market Size, Share and Growth Outlook 2026: By Type, By Animal Type, By Therapeu...

Analysis

Leading companies in Veterinary Precision Medicine industry include- Zoetis Inc., Boehringer Ingelheim Animal Health, Merck Animal Health, Elanco Animal Health, IDEXX Laboratories, Inc., Ceva Santé Animale, Dechra Pharmaceuticals PLC, Virbac S.A., Vetoquinol S.A., Phibro Animal Health Corporation. The Veterinary Precision Medicine market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Veterinary Precision Medicine Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Veterinary Precision Medicine market remains one of the strongest-performing segments in the country.

The US Veterinary Precision Medicine Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Veterinary Precision Medicine market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Veterinary Precision Medicine industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Veterinary Precision Medicine markets

Canada's strong Veterinary Precision Medicine sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Veterinary Precision Medicine market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Veterinary Precision Medicine Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Veterinary Precision Medicine market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Veterinary Precision Medicine population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Veterinary Precision Medicine industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Veterinary Precision Medicine market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Veterinary Precision Medicine sales through 2034

France Veterinary Precision Medicine companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city

care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Veterinary Precision Medicine Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Veterinary Precision Medicine distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Veterinary Precision Medicine Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Veterinary Precision Medicine market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Veterinary Precision Medicine industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Veterinary Precision Medicine industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Veterinary Precision Medicine Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Veterinary Precision Medicine market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Veterinary Precision Medicine market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Veterinary Precision Medicine Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Veterinary Precision Medicine Market Segmentation

By Type

Genomic Profiling and Sequencing

Diagnostic and Pathology

Precision Therapy and Treatment

Bioinformatics and Data Analytics

By Animal Type

Dogs

Cats

Horses

Production / Livestock Animals

By Therapeutic Area

Oncology

Infectious Diseases

Immunology and Autoimmune Disorders

Musculoskeletal Disorders

Cardiology and Neurology

By Customer

Veterinary Hospitals and Clinics

Veterinary Diagnostic Laboratories

Veterinary Academic and Research Institutions

Leading Companies in Veterinary Precision Medicine Industry (2026)

Zoetis Inc.

Boehringer Ingelheim Animal Health

Merck Animal Health

Elanco Animal Health

IDEXX Laboratories, Inc.

Ceva Santé Animale

Dechra Pharmaceuticals PLC

Virbac S.A.

Vetoquinol S.A.

Phibro Animal Health Corporation

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia,
Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa,
Other Africa

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Diagnostic and Pathology
Precision Therapy and Treatment
Bioinformatics and Data Analytics
By Animal Type
Dogs
Cats
Horses
Production / Livestock Animals
By Therapeutic Area
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