

**United States Veterinary Diagnostics Market Assessment, By Product [Consumables, Instruments], By Technology [Molecular Immunodiagnostics, Molecular Diagnostics, Clinical Biochemistry, Hematology, Others], By Animal Type [Companion Animals, Livestock], By Application [Infectious Diseases, Endocrinology, Oncology, Cardiology, Others], By End-user [Veterinary Hospitals and Clinics, Veterinary Reference Laboratories], By Region, Opportunities and Forecast, 2017-2031F**

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**Report description:**

United States veterinary diagnostics market is projected to witness a CAGR of 8.02% during the forecast period 2024-2031, growing from USD 2,048.03 million in 2023 to USD 3,796.84 million in 2031. The growth of the market is supported by increasing funding, rising development of novel products, technological advancements, the growing threat of infectious diseases, and supportive collaborations and partnerships by key market players. The market's demand is increasing to protect the food supply chain by ensuring the health and well-being of the livestock and early detection of diseased animals.

Various research and educational institutions across the country are working towards improving their research capabilities by supporting infrastructural expansion, to support the development of advanced veterinary diagnostic solutions. For instance, in April 2024, Iowa State University started the second phase of its new Veterinary Diagnostic Laboratory's (VDL) construction project. With the new facility, the VDL aims to strengthen its position as the national leader in ensuring and advancing animal health, public health, and food safety. The facility has the most significant animal caseload in the country and serves some of the most advanced poultry and livestock producers across the globe. The expansion of the facility is expected to foster innovation and advance veterinary diagnostic medicine, bolstering the availability of novel technologies in the country.

Furthermore, the increasing efforts of the market players towards the development and introduction of novel technologies are

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supporting the growth of the market. In September 2024, Zoetis Services LLC launched Vetscan OptiCall, a diagnostic tool powered by artificial intelligence to receive an advanced Complete Blood Count (CBC) analysis. The hematology analyzer delivers high-quality results, provides a compact footprint, and enables improved efficiency.

#### Increasing Fundings to Support Market Expansion

The increasing funding initiatives to advance research activities and facilitate innovations related to veterinary diagnostics is boosting the growth of the United States veterinary diagnostics market. The rising funding is expected to improve the understanding of animal health and various infectious diseases, which in turn will allow researchers to develop innovative diagnostic solutions to combat the rising threat of different diseases among animals. Additionally, various veterinary diagnostic laboratories across the country are receiving funding for enhancement and expansion of their infrastructure. In July 2024, the New York State Veterinary Diagnostic Laboratory (NYSVDI) received USD 19.5 million in capital funding to expand its building to meet the increasing caseload. The construction project will add 26,000 square feet to the workstation, offices, conferences, training labs, laboratories, and space for storage and material preparation. Additionally, the expansion is expected to provide workforce development opportunities for training qualified diagnosticians.

#### Technological Advancements to Boost Market Growth

The development and integration of novel technologies with veterinary diagnostic solutions is propelling the market's expansion. The advancements in veterinary diagnostics over the past few years have allowed the improvement of outcomes, increased convenience, and ensure the delivery of enhanced patient care. Advancements in imaging technologies, including magnetic resonance imaging (MRI) and computed tomography (CT) have significantly improved the capabilities of veterinary diagnostics. These technologies ensure the provision of images with high resolutions, allowing for detailed assessment of the organ by veterinarians, allowing them to diagnose complex conditions with ease. Scientists believe that automation will be the next big leap toward the improvement of diagnostic efficiency, and more of the industry's research activities related to diagnostic testing will be conducted with next-generation sequencing technologies and metagenomics. Meanwhile, the introduction of new technologies that aid in delivering information and images at a rapid rate to specialists and practitioners is expected to improve accessibility to patient care and ensure the provision of high-quality services for animals.

#### The Segment of Companion Animals to Hold Major Market Share

The rising popularity of pet ownership in the country and increasing investments by pet owners toward their health are some of the major factors supporting the segment's expansion. According to the estimates of the American Pet Products Association, in 2023, USD 147 billion was spent on pets in the United States, out of which USD 32 billion was spent on supplies, live animals, and OTC medicine and USD 38.3 billion on vet care, product sales, and others. The increasing proactiveness of pet owners towards the well-being of their pets has resulted in routine health checkups, tests, and vaccinations becoming standard practices. Thus, bolstering the demand for diagnostic tests to identify potential health issues and assess the well-being of the companion animals. Additionally, the growing awareness among the general population about zoonotic diseases is supporting the growth of the segment.

#### Infectious Diseases to Account for Significant Market Share

The rising cases of infectious diseases and the increasing threat of zoonotic diseases are propelling the market's expansion. Due to the growing awareness about animal health and the threat of such diseases, regular health screenings are being deployed to ensure the early identification of infections to improve treatment outcomes. Additionally, the government is taking various measures to combat different viruses. For instance, in May 2024, the country's federal authorities pledged approximately USD 200 million in efforts to control the rising cases of bird flu on dairy farms. Additionally, the funds are intended to encourage testing of the people who work on the farm on a regular basis and dairy cows to evaluate the scope of bird flu and introduce various measures to combat this growing threat. Such efforts are expected to bolster the requirement for different diagnostic technologies, boosting the demand for the veterinary diagnostics market in the United States.

#### Future Market Scenario (2024 - 2031F)

- The market is expected to witness significant growth opportunities in the forecast years owing to increasing pet ownership, advancements in veterinary diagnostic technologies, and increasing investments in research and development activities.
- The growing emphasis on preventive health measures, along with the increasing efforts of veterinarians to promote wellness programs and regular screenings, is expected to bolster the market's demand in the forecast years. Pet and livestock owners are

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seeking to provide the best care available to ensure the well-being of animals, encouraging the development of targeted diagnostic solutions.

Meanwhile, the growing acceptance of new technologies and increasing diagnostic advancements are further expected to bolster the market's expansion over the forecast period. Innovations, including molecular diagnostics and point-of-care testing, are improving the accuracy and speed of the diagnoses and allowing the delivery of swift results.

#### Key Players Landscape and Outlook

Investments by market players towards collaborations and partnerships are supporting the development and availability of novel products and technologies, bolstering the growth of the United States veterinary diagnostics market. In January 2022, IDEXX Laboratories, Inc. and PetDx Inc. announced a collaboration to improve canine cancer liquid biopsy testing access. With the help of IDEXX's large distribution network, PetDx aims to augment the availability of OncoK9, their non-invasive cancer testing solution, and accelerate their efforts to introduce novel technologies in the market.

Additionally, in November 2023, Thermo Fisher Scientific Inc. and Flagship Pioneering, Inc. announced the formation of a partnership for commercially scaling and developing multiproduct platforms in an accelerated manner. The partnership aims to extend Flagship's ecosystem and leverage the expertise of the two companies in the areas of diagnostics and life science tools, among others. Flagship's extensive commercial capabilities and Thermo Fisher's technical expertise are expected to bolster the introduction of innovative solutions in the market.

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