

# **Global Veterinary Defibrillators Market Size study, by Modality (Manual, Automatic), by Technology (Monophasic, Biphasic), by Functionality, by Animal, by End-use and Regional Forecasts 2022-2032**

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## **Abstracts**

Global Veterinary Defibrillators Market is valued at approximately USD 0.68 billion in 2023 and is projected to expand with a compound annual growth rate of over 5.66% through the forecast period 2024–2032. As veterinary care becomes increasingly sophisticated, the demand for advanced life-saving equipment such as defibrillators has soared in both companion animal and livestock practices. Veterinary defibrillators, once considered a luxury, are now viewed as essential components of critical care and surgical preparedness, enabling veterinarians to effectively manage sudden cardiac arrests and arrhythmias. With a growing emphasis on emergency response infrastructure in animal hospitals and clinics, defibrillators tailored for species-specific anatomical and physiological variations are quickly gaining prominence across the sector.

The surge in pet ownership, coupled with heightened awareness surrounding animal healthcare standards, has propelled adoption of veterinary defibrillators globally. Companion animals are living longer due to better nutrition and regular health monitoring, but with age comes a higher incidence of heart-related ailments. The increased need for cardiac monitoring and therapeutic interventions in veterinary surgeries, combined with the proliferation of specialty animal hospitals, has pushed manufacturers to innovate compact, intuitive, and AI-integrated devices. Biphasic defibrillators, in particular, are being preferred over monophasic due to their higher efficacy and reduced energy levels—translating to minimal myocardial damage in animals. Moreover, the automatic modality is witnessing strong traction due to its user-friendly operation, reducing dependency on intensive manual training.

Nonetheless, challenges in this market persist. These include cost-intensive procurement and maintenance, limited awareness among rural veterinary practices, and a lack of standardized clinical protocols for animal defibrillation across global regions. Many small clinics struggle with funding for such capital-intensive equipment, limiting their ability to offer comprehensive emergency services. Additionally, the fragmented nature of veterinary infrastructure in developing nations restricts widespread adoption. However, rising government grants, educational initiatives by veterinary associations, and emerging tele-veterinary platforms are gradually helping bridge this gap and fostering broader market penetration.

Digitalization and modular equipment design are revolutionizing the user experience in this domain. Wireless functionality, battery optimization, cloud-based data sharing, and integrated ECG monitoring are elevating operational efficiency for veterinary professionals. Companies are also investing in portable units designed for field veterinarians and animal rescue organizations—extending the scope of defibrillation beyond conventional clinical settings. Partnerships between veterinary colleges, equipment providers, and animal welfare NGOs are facilitating cost-effective training and distribution programs, making defibrillators more accessible to underserved areas.

Geographically, North America dominated the veterinary defibrillators market in 2023, underpinned by the presence of well-equipped animal hospitals, early adoption of medical innovations, and supportive reimbursement structures. Europe closely follows, benefitting from robust veterinary healthcare regulations and rapid technological implementation in clinical practices. Meanwhile, Asia Pacific is expected to experience the fastest growth over the forecast period, driven by increasing pet ownership in countries like India and China, along with expanding veterinary infrastructure. Latin America and the Middle East & Africa are witnessing a gradual uptick in demand as veterinary care becomes more integrated into national animal health programs and private-sector initiatives expand.

Major market player included in this report are:

Bionet America, Inc.

Midmark Corporation

Medtronic

Nihon Kohden Corporation

Schiller AG

Vetronics Services

Edan Instruments, Inc.

Philips Healthcare

CU Medical Systems, Inc.

Zoll Medical Corporation

Biolight Co., Ltd.

Mindray Medical International Limited

Defibtech, LLC

Cardiac Science Corporation

Shenzhen Comen Medical Instruments Co., Ltd.

The detailed segments and sub-segment of the market are explained below:

By Modality

Manual

Automatic

By Technology

Monophasic

Biphasic

## By Functionality

External Defibrillators

Implantable Defibrillators

Wearable Defibrillators

## By Animal

Companion Animals

Livestock Animals

Exotic Animals

## By End-use

Veterinary Hospitals & Clinics

Animal Research Institutes

Emergency Response Teams

Others

## By Region:

### North America

U.S.

Canada

## Europe

UK

Germany

France

Spain

Italy

Rest of Europe

## Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

## Latin America

Brazil

Mexico

## Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

Years considered for the study are as follows:

Historical Year – 2022

Base Year – 2023

Forecast Period – 2024 to 2032

Key Takeaways:

Market Estimates & Forecast for 10 years from 2022 to 2032.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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