

Global Veterinary Breathing Circuits Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Veterinary Breathing Circuits competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Veterinary breathing circuits are essential medical consumables used to connect anesthesia machines or ventilators with the airways of animals, facilitating the delivery of inhaled gases, removal of exhaled gases, and maintaining a safe closed-loop system to ensure continuous and reliable anesthesia and respiratory support. The structure typically includes inspiratory and expiratory tubes, Y-connectors, reservoir bags, filters, and monitoring ports, and products are designed in various lengths, diameters, and materials to accommodate different animal sizes and surgical requirements. Upstream raw materials primarily consist of medical-grade polypropylene, polyethylene, ethylene-vinyl acetate, medical silicone, and thermoplastic elastomers, along with functional components such as metal springs, temperature and humidity sensors, and respiratory filtration membranes. Key upstream suppliers include BASF, Dow, SABIC, Corning, and Shin-Etsu Chemical, providing high-quality medical-grade materials that ensure the performance, safety, and reliability of veterinary breathing circuits. In 2024, the global sales volume of veterinary breathing circuits reached 8,223,684 units, with an average unit price of 7.6 USD per circuit and an average gross margin of 32.8%. The annual production capacity of a single production line is 400,000 units.

Regional Market Landscape The global veterinary breathing circuits market exhibits a clear regional distribution pattern, with North America accounting for 50% of the market, driven primarily by animal healthcare facilities and surgical centers in the United States and Canada that demand high-end breathing circuits. Europe accounts for 30%, where veterinary hospitals and clinics in Germany, France, and the United Kingdom support widespread adoption of both disposable and reusable products. The

Asia-Pacific region accounts for 15%, led by China, Japan, and India, where growth in veterinary surgeries and improved basic healthcare infrastructure drives demand for mid-tier products. Latin America accounts for 3%, with Brazil and Mexico as the main markets, increasing demand for cost-effective circuits. The Middle East and Africa account for 2%, with gradually improving veterinary facilities and imported high-end breathing circuits dominating. Upstream raw material suppliers such as BASF, Dow, and SABIC provide medical-grade plastics and functional components, connecting manufacturers with downstream veterinary healthcare providers to form a complete industry chain.

Technology Trends and Innovation Directions Technological trends in veterinary breathing circuits focus on lightweight design, low airflow resistance, anti-condensation features, and integrated heating and humidification systems. Tubing designs are increasingly adopting coaxial or dual-limb structures to optimize gas flow and are gradually integrating intelligent sensors for monitoring animal respiratory parameters and enabling data visualization. Material development emphasizes medical-grade polymers and environmentally degradable solutions, while heating and humidification systems are becoming standard in surgeries involving neonatal and critically ill animals. Upstream sensor and electronic component suppliers such as Honeywell and TE Connectivity provide essential support for these intelligent functionalities.

Policy and Industry Development Drivers The veterinary breathing circuits industry is influenced by stringent veterinary medical device registration, product quality certification, and environmental and safety regulations. Regulatory authorities require compliance with ISO, CE, and FDA standards, driving manufacturers to adopt high-standard raw materials and manufacturing processes. Veterinary reimbursement policies and clinical procurement systems directly impact the demand for disposable and reusable products. High-quality upstream raw material suppliers hold a central role in the supply chain, and regulatory guidance and industry standards are steering the market toward high-quality, traceable, and intelligent solutions.

The global Veterinary Breathing Circuits market size was estimated at USD 62.5 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 5.20% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Veterinary Breathing Circuits market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the

industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Veterinary Breathing Circuits market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Veterinary Breathing Circuits market.

Global Veterinary Breathing Circuits Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

A.M. Bickford
Advanced Anesthesia Specialists
Jorgensen Laboratories
Miden Medical
Midmark
Patterson Scientific
Smiths Medical Surgivet
Supera Anesthesia Innovations
Vetland Medical

Shenzhen Comen Medical Instruments
Shanghai Raymain Information Technology
Dolphinmed
RWD Life Science

Market Segmentation (by Type)

Semi-open Veterinary Breathing Circuits
Open Veterinary Breathing Circuits
Closed Veterinary Breathing Circuits

Market Segmentation (by Application)

Pet Hospital
Veterinary Station
Other

Geographic Segmentation

North America (USA, Canada, Mexico)
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)
South America (Brazil, Argentina, Columbia, Rest of South America)
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance
Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value
In-depth analysis of the Veterinary Breathing Circuits Market
Overview of the regional outlook of the Veterinary Breathing Circuits Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Veterinary Breathing Circuits Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Veterinary Breathing Circuits, their output value, profit level, regional supply, production capacity layout, etc. from the

supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

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Contents

1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE

- 1.1 Market Definition and Statistical Scope of Veterinary Breathing Circuits
- 1.2 Key Market Segments
 - 1.2.1 Veterinary Breathing Circuits Segment by Type
 - 1.2.2 Veterinary Breathing Circuits Segment by Application
- 1.3 Methodology & Sources of Information
 - 1.3.1 Research Methodology
 - 1.3.2 Research Process
 - 1.3.3 Market Breakdown and Data Triangulation
 - 1.3.4 Base Year
 - 1.3.5 Report Assumptions & Caveats

2 VETERINARY BREATHING CIRCUITS MARKET OVERVIEW

- 2.1 Global Market Overview
 - 2.1.1 Global Veterinary Breathing Circuits Market Size (M USD) Estimates and Forecasts (2020-2035)
 - 2.1.2 Global Veterinary Breathing Circuits Sales Estimates and Forecasts (2020-2035)
- 2.2 Market Segment Executive Summary
- 2.3 Global Market Size by Region

3 VETERINARY BREATHING CIRCUITS MARKET COMPETITIVE LANDSCAPE

- 3.1 Company Assessment Quadrant
- 3.2 Global Veterinary Breathing Circuits Product Life Cycle
- 3.3 Global Veterinary Breathing Circuits Sales by Manufacturers (2020-2025)
- 3.4 Global Veterinary Breathing Circuits Revenue Market Share by Manufacturers (2020-2025)
- 3.5 Veterinary Breathing Circuits Market Share by Company Type (Tier 1, Tier 2, and Tier 3)
- 3.6 Global Veterinary Breathing Circuits Average Price by Manufacturers (2020-2025)
- 3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types
- 3.8 Veterinary Breathing Circuits Market Competitive Situation and Trends
 - 3.8.1 Veterinary Breathing Circuits Market Concentration Rate
 - 3.8.2 Global 5 and 10 Largest Veterinary Breathing Circuits Players Market Share by Revenue

3.8.3 Mergers & Acquisitions, Expansion

4 VETERINARY BREATHING CIRCUITS INDUSTRY CHAIN ANALYSIS

4.1 Veterinary Breathing Circuits Industry Chain Analysis

4.2 Market Overview of Key Raw Materials

4.3 Midstream Market Analysis

4.4 Downstream Customer Analysis

5 THE DEVELOPMENT AND DYNAMICS OF VETERINARY BREATHING CIRCUITS MARKET

5.1 Key Development Trends

5.2 Driving Factors

5.3 Market Challenges

5.4 Industry News

5.4.1 New Product Developments

5.4.2 Mergers & Acquisitions

5.4.3 Expansions

5.4.4 Collaboration/Supply Contracts

5.5 PEST Analysis

5.5.1 Industry Policies Analysis

5.5.2 Economic Environment Analysis

5.5.3 Social Environment Analysis

5.5.4 Technological Environment Analysis

5.6 Global Veterinary Breathing Circuits Market Porter's Five Forces Analysis

5.6.1 Global Trade Frictions

5.6.2 U.S. Tariff Policy ? April 2025

5.6.3 Global Trade Frictions and Their Impacts to Veterinary Breathing Circuits Market

5.7 ESG Ratings of Leading Companies

6 VETERINARY BREATHING CIRCUITS MARKET SEGMENTATION BY TYPE

6.1 Evaluation Matrix of Segment Market Development Potential (Type)

6.2 Global Veterinary Breathing Circuits Sales Market Share by Type (2020-2025)

6.3 Global Veterinary Breathing Circuits Market Size by Type (2020-2025)

6.4 Global Veterinary Breathing Circuits Price by Type (2020-2025)

7 VETERINARY BREATHING CIRCUITS MARKET SEGMENTATION BY

APPLICATION

- 7.1 Evaluation Matrix of Segment Market Development Potential (Application)
- 7.2 Global Veterinary Breathing Circuits Market Sales by Application (2020-2025)
- 7.3 Global Veterinary Breathing Circuits Market Size (M USD) by Application (2020-2025)
- 7.4 Global Veterinary Breathing Circuits Sales Growth Rate by Application (2020-2025)

8 VETERINARY BREATHING CIRCUITS MARKET SALES BY REGION

- 8.1 Global Veterinary Breathing Circuits Sales by Region
 - 8.1.1 Global Veterinary Breathing Circuits Sales by Region
 - 8.1.2 Global Veterinary Breathing Circuits Sales Market Share by Region
- 8.2 Global Veterinary Breathing Circuits Market Size by Region
 - 8.2.1 Global Veterinary Breathing Circuits Market Size by Region
 - 8.2.2 Global Veterinary Breathing Circuits Market Size by Region
- 8.3 North America
 - 8.3.1 North America Veterinary Breathing Circuits Sales by Country
 - 8.3.2 North America Veterinary Breathing Circuits Market Size by Country
 - 8.3.3 U.S. Market Overview
 - 8.3.4 Canada Market Overview
 - 8.3.5 Mexico Market Overview
- 8.4 Europe
 - 8.4.1 Europe Veterinary Breathing Circuits Sales by Country
 - 8.4.2 Europe Veterinary Breathing Circuits Market Size by Country
 - 8.4.3 Germany Market Overview
 - 8.4.4 France Market Overview
 - 8.4.5 U.K. Market Overview
 - 8.4.6 Italy Market Overview
 - 8.4.7 Spain Market Overview
- 8.5 Asia Pacific
 - 8.5.1 Asia Pacific Veterinary Breathing Circuits Sales by Region
 - 8.5.2 Asia Pacific Veterinary Breathing Circuits Market Size by Region
 - 8.5.3 China Market Overview
 - 8.5.4 Japan Market Overview
 - 8.5.5 South Korea Market Overview
 - 8.5.6 India Market Overview
 - 8.5.7 Southeast Asia Market Overview
- 8.6 South America

- 8.6.1 South America Veterinary Breathing Circuits Sales by Country
- 8.6.2 South America Veterinary Breathing Circuits Market Size by Country
- 8.6.3 Brazil Market Overview
- 8.6.4 Argentina Market Overview
- 8.6.5 Columbia Market Overview
- 8.7 Middle East and Africa
 - 8.7.1 Middle East and Africa Veterinary Breathing Circuits Sales by Region
 - 8.7.2 Middle East and Africa Veterinary Breathing Circuits Market Size by Region
 - 8.7.3 Saudi Arabia Market Overview
 - 8.7.4 UAE Market Overview
 - 8.7.5 Egypt Market Overview
 - 8.7.6 Nigeria Market Overview
 - 8.7.7 South Africa Market Overview

9 VETERINARY BREATHING CIRCUITS MARKET PRODUCTION BY REGION

- 9.1 Global Production of Veterinary Breathing Circuits by Region(2020-2025)
- 9.2 Global Veterinary Breathing Circuits Revenue Market Share by Region (2020-2025)
- 9.3 Global Veterinary Breathing Circuits Production, Revenue, Price and Gross Margin (2020-2025)
- 9.4 North America Veterinary Breathing Circuits Production
 - 9.4.1 North America Veterinary Breathing Circuits Production Growth Rate (2020-2025)
 - 9.4.2 North America Veterinary Breathing Circuits Production, Revenue, Price and Gross Margin (2020-2025)
- 9.5 Europe Veterinary Breathing Circuits Production
 - 9.5.1 Europe Veterinary Breathing Circuits Production Growth Rate (2020-2025)
 - 9.5.2 Europe Veterinary Breathing Circuits Production, Revenue, Price and Gross Margin (2020-2025)
- 9.6 Japan Veterinary Breathing Circuits Production (2020-2025)
 - 9.6.1 Japan Veterinary Breathing Circuits Production Growth Rate (2020-2025)
 - 9.6.2 Japan Veterinary Breathing Circuits Production, Revenue, Price and Gross Margin (2020-2025)
- 9.7 China Veterinary Breathing Circuits Production (2020-2025)
 - 9.7.1 China Veterinary Breathing Circuits Production Growth Rate (2020-2025)
 - 9.7.2 China Veterinary Breathing Circuits Production, Revenue, Price and Gross Margin (2020-2025)

10 KEY COMPANIES PROFILE

10.1 A.M. Bickford

10.1.1 A.M. Bickford Basic Information

10.1.2 A.M. Bickford Veterinary Breathing Circuits Product Overview

10.1.3 A.M. Bickford Veterinary Breathing Circuits Product Market Performance

10.1.4 A.M. Bickford Business Overview

10.1.5 A.M. Bickford SWOT Analysis

10.1.6 A.M. Bickford Recent Developments

10.2 Advanced Anesthesia Specialists

10.2.1 Advanced Anesthesia Specialists Basic Information

10.2.2 Advanced Anesthesia Specialists Veterinary Breathing Circuits Product Overview

10.2.3 Advanced Anesthesia Specialists Veterinary Breathing Circuits Product Market Performance

10.2.4 Advanced Anesthesia Specialists Business Overview

10.2.5 Advanced Anesthesia Specialists SWOT Analysis

10.2.6 Advanced Anesthesia Specialists Recent Developments

10.3 Jorgensen Laboratories

10.3.1 Jorgensen Laboratories Basic Information

10.3.2 Jorgensen Laboratories Veterinary Breathing Circuits Product Overview

10.3.3 Jorgensen Laboratories Veterinary Breathing Circuits Product Market Performance

10.3.4 Jorgensen Laboratories Business Overview

10.3.5 Jorgensen Laboratories SWOT Analysis

10.3.6 Jorgensen Laboratories Recent Developments

10.4 Miden Medical

10.4.1 Miden Medical Basic Information

10.4.2 Miden Medical Veterinary Breathing Circuits Product Overview

10.4.3 Miden Medical Veterinary Breathing Circuits Product Market Performance

10.4.4 Miden Medical Business Overview

10.4.5 Miden Medical Recent Developments

10.5 Midmark

10.5.1 Midmark Basic Information

10.5.2 Midmark Veterinary Breathing Circuits Product Overview

10.5.3 Midmark Veterinary Breathing Circuits Product Market Performance

10.5.4 Midmark Business Overview

10.5.5 Midmark Recent Developments

10.6 Patterson Scientific

10.6.1 Patterson Scientific Basic Information

- 10.6.2 Patterson Scientific Veterinary Breathing Circuits Product Overview
- 10.6.3 Patterson Scientific Veterinary Breathing Circuits Product Market Performance
- 10.6.4 Patterson Scientific Business Overview
- 10.6.5 Patterson Scientific Recent Developments
- 10.7 Smiths Medical Surgivet
 - 10.7.1 Smiths Medical Surgivet Basic Information
 - 10.7.2 Smiths Medical Surgivet Veterinary Breathing Circuits Product Overview
 - 10.7.3 Smiths Medical Surgivet Veterinary Breathing Circuits Product Market Performance
 - 10.7.4 Smiths Medical Surgivet Business Overview
 - 10.7.5 Smiths Medical Surgivet Recent Developments
- 10.8 Supera Anesthesia Innovations
 - 10.8.1 Supera Anesthesia Innovations Basic Information
 - 10.8.2 Supera Anesthesia Innovations Veterinary Breathing Circuits Product Overview
 - 10.8.3 Supera Anesthesia Innovations Veterinary Breathing Circuits Product Market Performance
 - 10.8.4 Supera Anesthesia Innovations Business Overview
 - 10.8.5 Supera Anesthesia Innovations Recent Developments
- 10.9 Vetland Medical
 - 10.9.1 Vetland Medical Basic Information
 - 10.9.2 Vetland Medical Veterinary Breathing Circuits Product Overview
 - 10.9.3 Vetland Medical Veterinary Breathing Circuits Product Market Performance
 - 10.9.4 Vetland Medical Business Overview
 - 10.9.5 Vetland Medical Recent Developments
- 10.10 Shenzhen Comen Medical Instruments
 - 10.10.1 Shenzhen Comen Medical Instruments Basic Information
 - 10.10.2 Shenzhen Comen Medical Instruments Veterinary Breathing Circuits Product Overview
 - 10.10.3 Shenzhen Comen Medical Instruments Veterinary Breathing Circuits Product Market Performance
 - 10.10.4 Shenzhen Comen Medical Instruments Business Overview
 - 10.10.5 Shenzhen Comen Medical Instruments Recent Developments
- 10.11 Shanghai Raymain Information Technology
 - 10.11.1 Shanghai Raymain Information Technology Basic Information
 - 10.11.2 Shanghai Raymain Information Technology Veterinary Breathing Circuits Product Overview
 - 10.11.3 Shanghai Raymain Information Technology Veterinary Breathing Circuits Product Market Performance
 - 10.11.4 Shanghai Raymain Information Technology Business Overview

- 10.11.5 Shanghai Raymain Information Technology Recent Developments
- 10.12 Dolphinmed
 - 10.12.1 Dolphinmed Basic Information
 - 10.12.2 Dolphinmed Veterinary Breathing Circuits Product Overview
 - 10.12.3 Dolphinmed Veterinary Breathing Circuits Product Market Performance
 - 10.12.4 Dolphinmed Business Overview
 - 10.12.5 Dolphinmed Recent Developments
- 10.13 RWD Life Science
 - 10.13.1 RWD Life Science Basic Information
 - 10.13.2 RWD Life Science Veterinary Breathing Circuits Product Overview
 - 10.13.3 RWD Life Science Veterinary Breathing Circuits Product Market Performance
 - 10.13.4 RWD Life Science Business Overview
 - 10.13.5 RWD Life Science Recent Developments

11 VETERINARY BREATHING CIRCUITS MARKET FORECAST BY REGION

- 11.1 Global Veterinary Breathing Circuits Market Size Forecast
- 11.2 Global Veterinary Breathing Circuits Market Forecast by Region
 - 11.2.1 North America Market Size Forecast by Country
 - 11.2.2 Europe Veterinary Breathing Circuits Market Size Forecast by Country
 - 11.2.3 Asia Pacific Veterinary Breathing Circuits Market Size Forecast by Region
 - 11.2.4 South America Veterinary Breathing Circuits Market Size Forecast by Country
 - 11.2.5 Middle East and Africa Forecasted Sales of Veterinary Breathing Circuits by Country

12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)

- 12.1 Global Veterinary Breathing Circuits Market Forecast by Type (2026-2035)
 - 12.1.1 Global Forecasted Sales of Veterinary Breathing Circuits by Type (2026-2035)
 - 12.1.2 Global Veterinary Breathing Circuits Market Size Forecast by Type (2026-2035)
 - 12.1.3 Global Forecasted Price of Veterinary Breathing Circuits by Type (2026-2035)
- 12.2 Global Veterinary Breathing Circuits Market Forecast by Application (2026-2035)
 - 12.2.1 Global Veterinary Breathing Circuits Sales (K Units) Forecast by Application
 - 12.2.2 Global Veterinary Breathing Circuits Market Size (M USD) Forecast by Application (2026-2035)

13 CONCLUSION AND KEY FINDINGS

List Of Tables

LIST OF TABLES

Table 1. Introduction of the Type

Table 2. Introduction of the Application

Table 3. Global Veterinary Breathing Circuits Market Size by Type (M USD)

Table 4. Global Veterinary Breathing Circuits Market Size by Application

Table 5. Veterinary Breathing Circuits Market Size Comparison by Region (M USD)

Table 6. Global Veterinary Breathing Circuits Sales (K Units) by Manufacturers (2020-2025)

Table 7. Global Veterinary Breathing Circuits Sales Market Share by Manufacturers (2020-2025)

Table 8. Global Veterinary Breathing Circuits Revenue (M USD) by Manufacturers (2020-2025)

Table 9. Global Veterinary Breathing Circuits Revenue Share by Manufacturers (2020-2025)

Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in Veterinary Breathing Circuits as of 2025)

Table 11. Global Market Veterinary Breathing Circuits Average Price (USD/Unit) of Key Manufacturers (2020-2025)

Table 12. Manufacturers? Manufacturing Sites, Areas Served

Table 13. Manufacturers? Product Type

Table 14. Global Veterinary Breathing Circuits Manufacturers Market Concentration Ratio (CR5 and HHI)

Table 15. Mergers & Acquisitions, Expansion Plans

Table 16. Market Overview of Key Raw Materials

Table 17. Midstream Market Analysis

Table 18. Downstream Customer Analysis

Table 19. Key Development Trends

Table 20. Driving Factors

Table 21. Veterinary Breathing Circuits Market Challenges

Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026

Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027

Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026

Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries

Table 26. Global Veterinary Breathing Circuits Sales by Type (K Units)

Table 27. Global Veterinary Breathing Circuits Market Size by Type (M USD)

- Table 28. Global Veterinary Breathing Circuits Sales (K Units) by Type (2020-2025)
- Table 29. Global Veterinary Breathing Circuits Sales Market Share by Type (2020-2025)
- Table 30. Global Veterinary Breathing Circuits Market Size (M USD) by Type (2020-2025)
- Table 31. Global Veterinary Breathing Circuits Market Share by Type (2020-2025)
- Table 32. Global Veterinary Breathing Circuits Price (USD/Unit) by Type (2020-2025)
- Table 33. Global Veterinary Breathing Circuits Sales (K Units) by Application
- Table 34. Global Veterinary Breathing Circuits Market Size by Application
- Table 35. Global Veterinary Breathing Circuits Sales by Application (2020-2025) & (K Units)
- Table 36. Global Veterinary Breathing Circuits Sales Market Share by Application (2020-2025)
- Table 37. Global Veterinary Breathing Circuits Market Size by Application (2020-2025) & (M USD)
- Table 38. Global Veterinary Breathing Circuits Market Share by Application (2020-2025)
- Table 39. Global Veterinary Breathing Circuits Sales Growth Rate by Application (2020-2025)
- Table 40. Global Veterinary Breathing Circuits Sales by Region (2020-2025) & (K Units)
- Table 41. Global Veterinary Breathing Circuits Sales Market Share by Region (2020-2025)
- Table 42. Global Veterinary Breathing Circuits Market Size by Region (2020-2025) & (M USD)
- Table 43. Global Veterinary Breathing Circuits Market Size by Region (2020-2025)
- Table 44. North America Veterinary Breathing Circuits Sales by Country (2020-2025) & (K Units)
- Table 45. North America Veterinary Breathing Circuits Market Size by Country (2020-2025) & (M USD)
- Table 46. Europe Veterinary Breathing Circuits Sales by Country (2020-2025) & (K Units)
- Table 47. Europe Veterinary Breathing Circuits Market Size by Country (2020-2025) & (M USD)
- Table 48. Asia Pacific Veterinary Breathing Circuits Sales by Region (2020-2025) & (K Units)
- Table 49. Asia Pacific Veterinary Breathing Circuits Market Size by Region (2020-2025) & (M USD)
- Table 50. South America Veterinary Breathing Circuits Sales by Country (2020-2025) & (K Units)
- Table 51. South America Veterinary Breathing Circuits Market Size by Country (2020-2025) & (M USD)

Table 52. Middle East and Africa Veterinary Breathing Circuits Sales by Region (2020-2025) & (K Units)

Table 53. Middle East and Africa Veterinary Breathing Circuits Market Size by Region (2020-2025) & (M USD)

Table 54. Global Veterinary Breathing Circuits Production (K Units) by Region(2020-2025)

Table 55. Global Veterinary Breathing Circuits Revenue (US\$ Million) by Region (2020-2025)

Table 56. Global Veterinary Breathing Circuits Revenue Market Share by Region (2020-2025)

Table 57. Global Veterinary Breathing Circuits Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 58. North America Veterinary Breathing Circuits Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 59. Europe Veterinary Breathing Circuits Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 60. Japan Veterinary Breathing Circuits Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 61. China Veterinary Breathing Circuits Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 62. A.M. Bickford Basic Information

Table 63. A.M. Bickford Veterinary Breathing Circuits Product Overview

Table 64. A.M. Bickford Veterinary Breathing Circuits Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 65. A.M. Bickford Business Overview

Table 66. A.M. Bickford SWOT Analysis

Table 67. A.M. Bickford Recent Developments

Table 68. Advanced Anesthesia Specialists Basic Information

Table 69. Advanced Anesthesia Specialists Veterinary Breathing Circuits Product Overview

Table 70. Advanced Anesthesia Specialists Veterinary Breathing Circuits Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 71. Advanced Anesthesia Specialists Business Overview

Table 72. Advanced Anesthesia Specialists SWOT Analysis

Table 73. Advanced Anesthesia Specialists Recent Developments

Table 74. Jorgensen Laboratories Basic Information

Table 75. Jorgensen Laboratories Veterinary Breathing Circuits Product Overview

Table 76. Jorgensen Laboratories Veterinary Breathing Circuits Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

- Table 77. Jorgensen Laboratories Business Overview
- Table 78. Jorgensen Laboratories SWOT Analysis
- Table 79. Jorgensen Laboratories Recent Developments
- Table 80. Miden Medical Basic Information
- Table 81. Miden Medical Veterinary Breathing Circuits Product Overview
- Table 82. Miden Medical Veterinary Breathing Circuits Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 83. Miden Medical Business Overview
- Table 84. Miden Medical Recent Developments
- Table 85. Midmark Basic Information
- Table 86. Midmark Veterinary Breathing Circuits Product Overview
- Table 87. Midmark Veterinary Breathing Circuits Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 88. Midmark Business Overview
- Table 89. Midmark Recent Developments
- Table 90. Patterson Scientific Basic Information
- Table 91. Patterson Scientific Veterinary Breathing Circuits Product Overview
- Table 92. Patterson Scientific Veterinary Breathing Circuits Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 93. Patterson Scientific Business Overview
- Table 94. Patterson Scientific Recent Developments
- Table 95. Smiths Medical Surgivet Basic Information
- Table 96. Smiths Medical Surgivet Veterinary Breathing Circuits Product Overview
- Table 97. Smiths Medical Surgivet Veterinary Breathing Circuits Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 98. Smiths Medical Surgivet Business Overview
- Table 99. Smiths Medical Surgivet Recent Developments
- Table 100. Supera Anesthesia Innovations Basic Information
- Table 101. Supera Anesthesia Innovations Veterinary Breathing Circuits Product Overview
- Table 102. Supera Anesthesia Innovations Veterinary Breathing Circuits Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 103. Supera Anesthesia Innovations Business Overview
- Table 104. Supera Anesthesia Innovations Recent Developments
- Table 105. Vetland Medical Basic Information
- Table 106. Vetland Medical Veterinary Breathing Circuits Product Overview
- Table 107. Vetland Medical Veterinary Breathing Circuits Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 108. Vetland Medical Business Overview

- Table 109. Vetland Medical Recent Developments
- Table 110. Shenzhen Comen Medical Instruments Basic Information
- Table 111. Shenzhen Comen Medical Instruments Veterinary Breathing Circuits Product Overview
- Table 112. Shenzhen Comen Medical Instruments Veterinary Breathing Circuits Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 113. Shenzhen Comen Medical Instruments Business Overview
- Table 114. Shenzhen Comen Medical Instruments Recent Developments
- Table 115. Shanghai Raymain Information Technology Basic Information
- Table 116. Shanghai Raymain Information Technology Veterinary Breathing Circuits Product Overview
- Table 117. Shanghai Raymain Information Technology Veterinary Breathing Circuits Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 118. Shanghai Raymain Information Technology Business Overview
- Table 119. Shanghai Raymain Information Technology Recent Developments
- Table 120. Dolphinmed Basic Information
- Table 121. Dolphinmed Veterinary Breathing Circuits Product Overview
- Table 122. Dolphinmed Veterinary Breathing Circuits Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 123. Dolphinmed Business Overview
- Table 124. Dolphinmed Recent Developments
- Table 125. RWD Life Science Basic Information
- Table 126. RWD Life Science Veterinary Breathing Circuits Product Overview
- Table 127. RWD Life Science Veterinary Breathing Circuits Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 128. RWD Life Science Business Overview
- Table 129. RWD Life Science Recent Developments
- Table 130. Global Veterinary Breathing Circuits Sales Forecast by Region (2026-2035) & (K Units)
- Table 131. Global Veterinary Breathing Circuits Market Size Forecast by Region (2026-2035) & (M USD)
- Table 132. North America Veterinary Breathing Circuits Sales Forecast by Country (2026-2035) & (K Units)
- Table 133. North America Veterinary Breathing Circuits Market Size Forecast by Country (2026-2035) & (M USD)
- Table 134. Europe Veterinary Breathing Circuits Sales Forecast by Country (2026-2035) & (K Units)
- Table 135. Europe Veterinary Breathing Circuits Market Size Forecast by Country (2026-2035) & (M USD)

Table 136. Asia Pacific Veterinary Breathing Circuits Sales Forecast by Region (2026-2035) & (K Units)

Table 137. Asia Pacific Veterinary Breathing Circuits Market Size Forecast by Region (2026-2035) & (M USD)

Table 138. South America Veterinary Breathing Circuits Sales Forecast by Country (2026-2035) & (K Units)

Table 139. South America Veterinary Breathing Circuits Market Size Forecast by Country (2026-2035) & (M USD)

Table 140. Middle East and Africa Veterinary Breathing Circuits Sales Forecast by Country (2026-2035) & (Units)

Table 141. Middle East and Africa Veterinary Breathing Circuits Market Size Forecast by Country (2026-2035) & (M USD)

Table 142. Global Veterinary Breathing Circuits Sales Forecast by Type (2026-2035) & (K Units)

Table 143. Global Veterinary Breathing Circuits Market Size Forecast by Type (2026-2035) & (M USD)

Table 144. Global Veterinary Breathing Circuits Price Forecast by Type (2026-2035) & (USD/Unit)

Table 145. Global Veterinary Breathing Circuits Sales (K Units) Forecast by Application (2026-2035)

Table 146. Global Veterinary Breathing Circuits Market Size Forecast by Application (2026-2035) & (M USD)

List Of Figures

LIST OF FIGURES

- Figure 1. Product Picture of Veterinary Breathing Circuits
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Veterinary Breathing Circuits Market Size (M USD), 2025-2035
- Figure 5. Global Veterinary Breathing Circuits Market Size (M USD) (2020-2035)
- Figure 6. Global Veterinary Breathing Circuits Sales (K Units) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. Veterinary Breathing Circuits Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global Veterinary Breathing Circuits Product Life Cycle
- Figure 13. Veterinary Breathing Circuits Sales Share by Manufacturers in 2025
- Figure 14. Global Veterinary Breathing Circuits Revenue Share by Manufacturers in 2025
- Figure 15. Veterinary Breathing Circuits Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market Veterinary Breathing Circuits Average Price (USD/Unit) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by Veterinary Breathing Circuits Revenue in 2025
- Figure 18. Industry Chain Map of Veterinary Breathing Circuits
- Figure 19. Global Veterinary Breathing Circuits Market PEST Analysis
- Figure 20. Global Veterinary Breathing Circuits Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 26. Global Veterinary Breathing Circuits Market Share by Type
- Figure 27. Sales Market Share of Veterinary Breathing Circuits by Type (2020-2025)
- Figure 28. Sales Market Share of Veterinary Breathing Circuits by Type in 2025
- Figure 29. Market Share of Veterinary Breathing Circuits by Type (2020-2025)
- Figure 30. Market Share of Veterinary Breathing Circuits by Type in 2025
- Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)

- Figure 32. Global Veterinary Breathing Circuits Market Share by Application
- Figure 33. Global Veterinary Breathing Circuits Sales Market Share by Application (2020-2025)
- Figure 34. Global Veterinary Breathing Circuits Sales Market Share by Application in 2025
- Figure 35. Global Veterinary Breathing Circuits Market Share by Application (2020-2025)
- Figure 36. Global Veterinary Breathing Circuits Market Share by Application in 2025
- Figure 37. Global Veterinary Breathing Circuits Sales Growth Rate by Application (2020-2025)
- Figure 38. Global Veterinary Breathing Circuits Sales Market Share by Region (2020-2025)
- Figure 39. Global Veterinary Breathing Circuits Market Size by Region (2020-2025)
- Figure 40. North America Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)
- Figure 41. North America Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)
- Figure 42. North America Veterinary Breathing Circuits Sales Market Share by Country in 2024
- Figure 43. North America Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 44. North America Veterinary Breathing Circuits Market Size by Country in 2024
- Figure 45. U.S. Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)
- Figure 46. U.S. Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 47. Canada Veterinary Breathing Circuits Sales (K Units) and Growth Rate (2020-2025)
- Figure 48. Canada Veterinary Breathing Circuits Market Size (M USD) and Growth Rate (2020-2025)
- Figure 49. Mexico Veterinary Breathing Circuits Sales (Units) and Growth Rate (2020-2025)
- Figure 50. Mexico Veterinary Breathing Circuits Market Size (Units) and Growth Rate (2020-2025)
- Figure 51. Europe Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)
- Figure 52. Europe Veterinary Breathing Circuits Sales Market Share by Country in 2024
- Figure 53. Europe Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe Veterinary Breathing Circuits Market Size by Country in 2024

Figure 55. Germany Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)

Figure 56. Germany Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)

Figure 58. France Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)

Figure 60. U.K. Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)

Figure 62. Italy Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)

Figure 64. Spain Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific Veterinary Breathing Circuits Sales and Growth Rate (K Units)

Figure 66. Asia Pacific Veterinary Breathing Circuits Sales Market Share by Region in 2024

Figure 67. Asia Pacific Veterinary Breathing Circuits Market Size by Region in 2024

Figure 68. China Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)

Figure 69. China Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)

Figure 71. Japan Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)

Figure 73. South Korea Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)

- Figure 75. India Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 76. Southeast Asia Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)
- Figure 77. Southeast Asia Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 78. South America Veterinary Breathing Circuits Sales and Growth Rate (K Units)
- Figure 79. South America Veterinary Breathing Circuits Sales Market Share by Country in 2024
- Figure 80. South America Veterinary Breathing Circuits Market Size and Growth Rate (M USD)
- Figure 81. South America Veterinary Breathing Circuits Market Size by Country in 2024
- Figure 82. Brazil Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)
- Figure 83. Brazil Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 84. Argentina Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)
- Figure 85. Argentina Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 86. Columbia Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)
- Figure 87. Columbia Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 88. Middle East and Africa Veterinary Breathing Circuits Sales and Growth Rate (K Units)
- Figure 89. Middle East and Africa Veterinary Breathing Circuits Sales Market Share by Region in 2024
- Figure 90. Middle East and Africa Veterinary Breathing Circuits Market Size and Growth Rate (M USD)
- Figure 91. Middle East and Africa Veterinary Breathing Circuits Market Size by Region in 2024
- Figure 92. Saudi Arabia Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)
- Figure 93. Saudi Arabia Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 94. UAE Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)

Figure 95. UAE Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)

Figure 97. Egypt Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)

Figure 99. Nigeria Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa Veterinary Breathing Circuits Sales and Growth Rate (2020-2025) & (K Units)

Figure 101. South Africa Veterinary Breathing Circuits Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global Veterinary Breathing Circuits Production Market Share by Region (2020-2025)

Figure 103. North America Veterinary Breathing Circuits Production (K Units) Growth Rate (2020-2025)

Figure 104. Europe Veterinary Breathing Circuits Production (K Units) Growth Rate (2020-2025)

Figure 105. Japan Veterinary Breathing Circuits Production (K Units) Growth Rate (2020-2025)

Figure 106. China Veterinary Breathing Circuits Production (K Units) Growth Rate (2020-2025)

Figure 107. Global Veterinary Breathing Circuits Sales Forecast by Volume (2020-2035) & (K Units)

Figure 108. Global Veterinary Breathing Circuits Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global Veterinary Breathing Circuits Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global Veterinary Breathing Circuits Market Share Forecast by Type (2026-2035)

Figure 111. Global Veterinary Breathing Circuits Sales Forecast by Application (2026-2035)

Figure 112. Global Veterinary Breathing Circuits Market Share Forecast by Application (2026-2035)

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