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Global Pet DR Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Pet DR market size is expected to reach $ 1666 million by 2032, rising at a market growth of 18.2% CAGR during the forecast period (2026-2032).

Pet DR refers to digital radiography equipment designed or configured for X-ray examination of dogs, cats and other companion animals. A typical Pet DR system integrates an X-ray tube, high-voltage generator, collimator, veterinary examination table or mobile support structure, flat-panel detector, image acquisition workstation and veterinary-specific imaging software, enabling X-rays transmitted through the animal to be directly converted into digital diagnostic images. The equipment is widely used for musculoskeletal, thoracic, abdominal, foreign-body and general diagnostic examinations in veterinary hospitals and clinics. Modern Pet DR increasingly incorporates large-area CsI flat-panel detectors, animal-specific anatomical exposure programs, automatic exposure detection, rapid image acquisition, intelligent image processing and DICOM/PACS connectivity.

Key Findings

In 2025, global Pet DR production reached approximately 15.7k units, with an average global market price of around US$32k per unit

Large-area CsI detectors and veterinary-specific exposure protocols are becoming common configurations in mainstream Pet DR systems

Image-processing intelligence positioning assistance and streamlined acquisition workflows are increasingly important product differentiators

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Competition is shifting from basic X-ray hardware toward integrated imaging software workflow and lifecycle service capabilities

Market Trends

The Pet DR market is evolving from basic digital replacement of film and computed radiography toward integrated veterinary imaging platforms optimized specifically for companion-animal workflow. Hardware development increasingly emphasizes large-area flat-panel detectors, high-frequency generators, compact structures, low-dose imaging and convenient animal positioning, while software development focuses on species- and anatomy-specific exposure presets, automatic image optimization, positioning assistance and rapid acquisition. Siemens Healthineers' SHARP VET is designed around veterinary positioning efficiency and accommodates a broad range of animal sizes, while Antech SmartDR integrates veterinary-specific workflow, a large-area cesium detector, automatic exposure detection and intelligent image processing. Mindray Animal Medical's VetiX platform similarly applies animal-specific exposure parameter matching and dedicated veterinary workflow design. Another important trend is greater connectivity: Pet DR is increasingly integrated with PACS, hospital information systems and remote radiology services, enabling images to move beyond the acquisition workstation into broader diagnostic workflows. Over the longer term, product differentiation will increasingly depend on image consistency, lower radiation exposure, easier positioning, faster workflow and software intelligence rather than detector size or generator output alone.

Market Dynamics

Drivers

The principal growth drivers are the continuing professionalization of companion-animal healthcare, expansion of veterinary hospitals and specialty services, replacement of conventional CR systems and growing demand for faster and more standardized diagnostic imaging. Radiography is one of the most fundamental imaging methods in small-animal practice because it can rapidly support diagnosis of fractures, joint abnormalities, pulmonary and cardiac conditions, abdominal disease and foreign bodies while requiring substantially lower investment and infrastructure than CT or MRI. Rising clinical expectations also encourage veterinary hospitals to move from basic X-ray equipment toward integrated DR systems capable of producing consistent images

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across different operators and animal sizes. At the same time, veterinary chains increasingly require standardized digital image acquisition and centralized image management across multiple locations, supporting adoption of systems with veterinary protocols, DICOM connectivity and remote interpretation capability.

Restraints

The Pet DR market remains constrained by equipment investment, relatively long replacement cycles and significant price competition among increasingly standardized hardware platforms. A complete fixed system requires an X-ray generator, tube, detector, examination table, workstation and appropriate radiation-protection arrangements, which can remain a meaningful investment for smaller veterinary practices. Clinics that already own functioning CR or earlier-generation DR systems may postpone replacement when existing image quality remains clinically acceptable. Flat-panel detectors are another important cost consideration because they represent a relatively expensive and damage-sensitive system component. As detector, generator and workstation technologies become more widely available, hardware differentiation narrows and price pressure increases. Manufacturers therefore need to justify premium positioning through stronger image-processing software, workflow design, reliability, warranty coverage and service support.

Opportunities

The most attractive opportunities are concentrated in the digital upgrading of small and mid-sized pet hospitals, compact DR platforms, wireless detector systems and software-enabled workflow improvement. Clinics moving from CR to DR can achieve faster image acquisition and eliminate plate-reading processes without adopting the significantly higher infrastructure burden associated with CT or MRI. Wireless flat-panel detectors further allow greater freedom in positioning and can support flexible examination-room layouts. Antech's SmartDR portfolio demonstrates the increasing emphasis on veterinary-specific workflows, detector technology and intelligent image processing, while Siemens Healthineers' SHARP VET emphasizes flexible patient positioning for different animal sizes. Additional opportunities are emerging through AI-assisted image enhancement, automated anatomical protocols, positioning guidance, cloud-based image management and tele-radiology. These software capabilities can improve diagnostic consistency and allow smaller hospitals without full-time imaging specialists to access higher-level interpretation services.

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Challenges

A major technical challenge is maintaining consistent diagnostic image quality across companion animals with significantly different body sizes, anatomy and positioning conditions. Exposure requirements differ considerably between small cats and large dogs, while animals often cannot cooperate with positioning instructions, increasing the importance of easy table movement, short exposure times and veterinary-specific parameter selection. Manufacturers must simultaneously optimize spatial resolution, contrast, radiation dose and acquisition speed. Detector durability and system reliability are also important because Pet DR equipment is frequently used at high clinical frequency and may be exposed to animal movement, body fluids and accidental impact. As core DR hardware becomes increasingly commoditized, another challenge is maintaining sustainable differentiation. Suppliers must increasingly compete through proprietary image processing, veterinary workflow software, clinical training, detector warranty policies and responsive technical service rather than relying solely on hardware specifications.

Industry Chain Analysis

The upstream Pet DR industry mainly includes X-ray tubes, high-voltage generators, collimators, flat-panel detectors, CsI or GOS scintillator materials, amorphous-silicon sensor arrays, image acquisition electronics, computing platforms, monitors, examination-table components and communication modules. Midstream manufacturers integrate these components with veterinary imaging software, exposure protocols, positioning tools and image-processing algorithms to form complete Pet DR systems. Representative participants include Siemens Healthineers, Antech Diagnostics and Mindray Animal Medical, which demonstrate different approaches to veterinary-specific DR system design and workflow integration. Downstream customers primarily consist of pet hospitals, veterinary clinics, specialty and referral centers, university veterinary hospitals and animal healthcare chains. Industry value is gradually shifting from basic hardware integration toward image quality, veterinary workflow, software, installation, clinical training, maintenance and remote imaging services.

Segment Insights

By installation type, Fixed Pet DR systems are primarily used in pet hospitals and

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veterinary clinics with dedicated X-ray examination areas and relatively stable radiography workloads. Typical systems integrate a stationary generator, X-ray tube, veterinary examination table, large-area flat-panel detector and workstation, providing standardized geometry and convenient positioning for thoracic, abdominal and musculoskeletal examinations. Siemens Healthineers' SHARP VET illustrates the development of veterinary-specific fixed radiography through a table architecture designed for different animal sizes and efficient positioning, while Mindray Animal Medical's VetiX platform integrates a large-area CsI detector with veterinary-specific exposure control. Fixed systems remain particularly suitable for high-frequency small-animal practices because of their stable imaging geometry, examination efficiency and ability to support standardized clinical workflows.

Mobile Pet DR systems emphasize flexible deployment and are suited to emergency departments, multi-room veterinary hospitals, temporary examination locations and practices where a dedicated fixed radiography room is difficult to justify. These configurations generally combine a portable or mobile X-ray generator with a wireless flat-panel detector and mobile acquisition workstation. Compared with fixed systems, product development places greater emphasis on compactness, battery capability, wireless connectivity, rapid setup and detector robustness. Mobile platforms can also complement fixed DR by expanding radiography access to animals that are difficult to transport or position. The market distinction between fixed and mobile systems therefore reflects not simply equipment mobility but differences in hospital infrastructure, examination frequency, operating workflow and target customer requirements.

Downstream Market Opportunities

Pet hospitals and veterinary clinics form the core downstream market because DR is a basic imaging modality used across general medicine, orthopedics, emergency care, cardiopulmonary diagnosis and abdominal examination. Larger specialty and referral hospitals require higher-end systems with advanced image processing, centralized PACS connectivity and standardized multi-user workflows, while smaller clinics represent an important replacement market as CR and earlier-generation X-ray systems are upgraded. Veterinary hospital chains offer additional opportunities because standardized DR platforms allow multiple branches to use consistent exposure protocols, image processing and diagnostic workflows. Remote radiology and cloud-based image sharing can further increase the clinical value of DR by allowing institutions without an on-site veterinary radiologist to obtain specialist image interpretation and consultation.

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Regional Insights

North America represents a mature Pet DR market, supported by an extensive companion-animal healthcare network, high adoption of digital radiography and strong demand for veterinary-specific imaging software and technical service. Antech's dedicated SmartDR portfolio reflects the region's mature demand for integrated small-animal imaging systems. Europe also has a developed veterinary healthcare infrastructure and stable demand for professional digital X-ray systems, while established medical imaging suppliers increasingly develop veterinary-oriented configurations. China is an increasingly important market as pet hospitals expand, CR systems are replaced by DR and domestic imaging companies develop dedicated animal medical product lines. Mindray Animal Medical's VetiX platform is representative of this specialization trend. Japan, South Korea and other developed Asian markets also have strong potential for high-quality veterinary digital imaging, while emerging markets are comparatively more sensitive to equipment affordability and local service availability.

Competitive Landscape Analysis

The Pet DR competitive landscape includes traditional medical imaging manufacturers, veterinary diagnostic imaging specialists and animal medical equipment companies. Representative participants include Siemens Healthineers, Antech Diagnostics and Mindray Animal Medical. Siemens Healthineers offers the veterinary-specific SHARP VET radiography platform; Antech provides SmartDR fixed digital radiography systems and a broader veterinary imaging ecosystem; Mindray Animal Medical develops the VetiX professional veterinary X-ray platform with animal-specific exposure management and workflow design. Competition increasingly centers on detector performance, image-processing algorithms, generator stability, animal positioning efficiency, exposure automation, software usability, connectivity and after-sales service. As core detectors and X-ray components become more standardized, sustainable competitive advantage is shifting toward veterinary-specific software, consistent image quality, workflow efficiency, customer training and lifecycle support.

Report Scope

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This report studies the global Pet DR production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Pet DR and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Pet DR that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Pet DR total production and demand, 2021-2032, (K Units)

Global Pet DR total production value, 2021-2032, (USD Million)

Global Pet DR production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Pet DR consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Pet DR domestic production, consumption, key domestic manufacturers and share

Global Pet DR production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Pet DR production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Pet DR production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Pet DR market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Siemens Healthineers, General Electric, Carestream Health, Antech Diagnostics, Animage Fidex, Epica Animal Health, Neurologica Corp, Hitachi

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Medical, Esaote, Molecubes, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Pet DR market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K Units) and average price (US$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Pet DR Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

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Global Pet DR Market, Segmentation by Type:

Fixed

Mobile

Global Pet DR Market, Segmentation by Detector Size:

14×17-inch

17×17-inch

Global Pet DR Market, Segmentation by Detector Materials:

CsI Flat-panel Detector

GOS Flat-panel Detector

Global Pet DR Market, Segmentation by Application:

Pet Hospital

Pet Clinic

Other

Companies Profiled:

Siemens Healthineers

General Electric

Carestream Health

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Antech Diagnostics

Animage Fidex

Epica Animal Health

Neurologica Corp

Hitachi Medical

Esaote

Molecubes

Mediso Medical

Sedecal

SinoVision

Pingsheng Healthcare

Tutom Animal Medical Equipment

DBC Inc.

Mindray Animal Medical

Neusoft Medical

United Imaging Healthcare

Minfound

Vetoo Med

Dawei Veterinary Medical

Wandong Medical

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BK Healthcare

iPetMed

Bizvet

DT Healthcare

Ruishi Medical

Key Questions Answered

1. How big is the global Pet DR market?
2. What is the demand of the global Pet DR market?
3. What is the year over year growth of the global Pet DR market?
4. What is the total value of the global Pet DR market?
5. Who are the Major Players in the global Pet DR market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

1.1 Pet DR Introduction
1.2 World Pet DR Supply & Forecast
  1.2.1 World Pet DR Production Value (2021 & 2025 & 2032)
  1.2.2 World Pet DR Production (2021-2032)
  1.2.3 World Pet DR Pricing Trends (2021-2032)
1.3 World Pet DR Production by Region (Based on Production Site)
  1.3.1 World Pet DR Production Value by Region (2021-2032)
  1.3.2 World Pet DR Production by Region (2021-2032)
  1.3.3 World Pet DR Average Price by Region (2021-2032)
  1.3.4 North America Pet DR Production (2021-2032)
  1.3.5 Europe Pet DR Production (2021-2032)
  1.3.6 China Pet DR Production (2021-2032)
  1.3.7 Japan Pet DR Production (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 Pet DR Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Pet DR Major Market Trends

2 DEMAND SUMMARY

2.1 World Pet DR Demand (2021-2032)
2.2 World Pet DR Consumption by Region
  2.2.1 World Pet DR Consumption by Region (2021-2026)
  2.2.2 World Pet DR Consumption Forecast by Region (2027-2032)
2.3 United States Pet DR Consumption (2021-2032)
2.4 China Pet DR Consumption (2021-2032)
2.5 Europe Pet DR Consumption (2021-2032)
2.6 Japan Pet DR Consumption (2021-2032)
2.7 South Korea Pet DR Consumption (2021-2032)
2.8 ASEAN Pet DR Consumption (2021-2032)
2.9 India Pet DR Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Pet DR Production Value by Manufacturer (2021-2026)

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3.2 World Pet DR Production by Manufacturer (2021-2026)
3.3 World Pet DR Average Price by Manufacturer (2021-2026)
3.4 Pet DR Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global Pet DR Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for Pet DR in 2025
  3.5.3 Global Concentration Ratios (CR8) for Pet DR in 2025
3.6 Pet DR Market: Overall Company Footprint Analysis
  3.6.1 Pet DR Market: Region Footprint
  3.6.2 Pet DR Market: Company Product Type Footprint
  3.6.3 Pet DR Market: Company Product Application Footprint
3.7 Competitive Environment
  3.7.1 Historical Structure of the Industry
  3.7.2 Barriers of Market Entry
  3.7.3 Factors of Competition
3.8 New Entrant and Capacity Expansion Plans
3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Pet DR Production Value Comparison
  4.1.1 United States VS China: Pet DR Production Value Comparison (2021 & 2025 & 2032)
  4.1.2 United States VS China: Pet DR Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: Pet DR Production Comparison
  4.2.1 United States VS China: Pet DR Production Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: Pet DR Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Pet DR Consumption Comparison
  4.3.1 United States VS China: Pet DR Consumption Comparison (2021 & 2025 & 2032)
  4.3.2 United States VS China: Pet DR Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based Pet DR Manufacturers and Market Share, 2021-2026
  4.4.1 United States Based Pet DR Manufacturers, Headquarters and Production Site (States, Country)
  4.4.2 United States Based Manufacturers Pet DR Production Value (2021-2026)
  4.4.3 United States Based Manufacturers Pet DR Production (2021-2026)

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info@marketpublishers.com

4.5 China Based Pet DR Manufacturers and Market Share
4.5.1 China Based Pet DR Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers Pet DR Production Value (2021-2026)
4.5.3 China Based Manufacturers Pet DR Production (2021-2026)
4.6 Rest of World Based Pet DR Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based Pet DR Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers Pet DR Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers Pet DR Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Pet DR Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Fixed
5.2.2 Mobile
5.3 Market Segment by Type
5.3.1 World Pet DR Production by Type (2021-2032)
5.3.2 World Pet DR Production Value by Type (2021-2032)
5.3.3 World Pet DR Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY DETECTOR SIZE

6.1 World Pet DR Market Size Overview by Detector Size: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Detector Size
6.2.1 14×17-inch
6.2.2 17×17-inch
6.3 Market Segment by Detector Size
6.3.1 World Pet DR Production by Detector Size (2021-2032)
6.3.2 World Pet DR Production Value by Detector Size (2021-2032)
6.3.3 World Pet DR Average Price by Detector Size (2021-2032)

7 MARKET ANALYSIS BY DETECTOR MATERIALS

7.1 World Pet DR Market Size Overview by Detector Materials: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Detector Materials
7.2.1 CsI Flat-panel Detector
7.2.2 GOS Flat-panel Detector

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7.3 Market Segment by Detector Materials
7.3.1 World Pet DR Production by Detector Materials (2021-2032)
7.3.2 World Pet DR Production Value by Detector Materials (2021-2032)
7.3.3 World Pet DR Average Price by Detector Materials (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Pet DR Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Pet Hospital
8.2.2 Pet Clinic
8.2.3 Other
8.3 Market Segment by Application
8.3.1 World Pet DR Production by Application (2021-2032)
8.3.2 World Pet DR Production Value by Application (2021-2032)
8.3.3 World Pet DR Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Siemens Healthineers
9.1.1 Siemens Healthineers Details
9.1.2 Siemens Healthineers Major Business
9.1.3 Siemens Healthineers Pet DR Product and Services
9.1.4 Siemens Healthineers Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.1.5 Siemens Healthineers Recent Developments/Updates
9.1.6 Siemens Healthineers Competitive Strengths & Weaknesses
9.2 General Electric
9.2.1 General Electric Details
9.2.2 General Electric Major Business
9.2.3 General Electric Pet DR Product and Services
9.2.4 General Electric Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.2.5 General Electric Recent Developments/Updates
9.2.6 General Electric Competitive Strengths & Weaknesses
9.3 Carestream Health
9.3.1 Carestream Health Details
9.3.2 Carestream Health Major Business
9.3.3 Carestream Health Pet DR Product and Services

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9.3.4 Carestream Health Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.3.5 Carestream Health Recent Developments/Updates
9.3.6 Carestream Health Competitive Strengths & Weaknesses
9.4 Antech Diagnostics
9.4.1 Antech Diagnostics Details
9.4.2 Antech Diagnostics Major Business
9.4.3 Antech Diagnostics Pet DR Product and Services
9.4.4 Antech Diagnostics Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 Antech Diagnostics Recent Developments/Updates
9.4.6 Antech Diagnostics Competitive Strengths & Weaknesses
9.5 Animage Fidex
9.5.1 Animage Fidex Details
9.5.2 Animage Fidex Major Business
9.5.3 Animage Fidex Pet DR Product and Services
9.5.4 Animage Fidex Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.5.5 Animage Fidex Recent Developments/Updates
9.5.6 Animage Fidex Competitive Strengths & Weaknesses
9.6 Epica Animal Health
9.6.1 Epica Animal Health Details
9.6.2 Epica Animal Health Major Business
9.6.3 Epica Animal Health Pet DR Product and Services
9.6.4 Epica Animal Health Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.6.5 Epica Animal Health Recent Developments/Updates
9.6.6 Epica Animal Health Competitive Strengths & Weaknesses
9.7 Neurologica Corp
9.7.1 Neurologica Corp Details
9.7.2 Neurologica Corp Major Business
9.7.3 Neurologica Corp Pet DR Product and Services
9.7.4 Neurologica Corp Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.7.5 Neurologica Corp Recent Developments/Updates
9.7.6 Neurologica Corp Competitive Strengths & Weaknesses
9.8 Hitachi Medical
9.8.1 Hitachi Medical Details
9.8.2 Hitachi Medical Major Business

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9.8.3 Hitachi Medical Pet DR Product and Services
9.8.4 Hitachi Medical Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.8.5 Hitachi Medical Recent Developments/Updates
9.8.6 Hitachi Medical Competitive Strengths & Weaknesses
9.9 Esaote
9.9.1 Esaote Details
9.9.2 Esaote Major Business
9.9.3 Esaote Pet DR Product and Services
9.9.4 Esaote Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.9.5 Esaote Recent Developments/Updates
9.9.6 Esaote Competitive Strengths & Weaknesses
9.10 Molecubes
9.10.1 Molecubes Details
9.10.2 Molecubes Major Business
9.10.3 Molecubes Pet DR Product and Services
9.10.4 Molecubes Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.10.5 Molecubes Recent Developments/Updates
9.10.6 Molecubes Competitive Strengths & Weaknesses
9.11 Mediso Medical
9.11.1 Mediso Medical Details
9.11.2 Mediso Medical Major Business
9.11.3 Mediso Medical Pet DR Product and Services
9.11.4 Mediso Medical Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.11.5 Mediso Medical Recent Developments/Updates
9.11.6 Mediso Medical Competitive Strengths & Weaknesses
9.12 Sedecal
9.12.1 Sedecal Details
9.12.2 Sedecal Major Business
9.12.3 Sedecal Pet DR Product and Services
9.12.4 Sedecal Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.12.5 Sedecal Recent Developments/Updates
9.12.6 Sedecal Competitive Strengths & Weaknesses
9.13 SinoVision
9.13.1 SinoVision Details

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info@marketpublishers.com

9.13.2 SinoVision Major Business
9.13.3 SinoVision Pet DR Product and Services
9.13.4 SinoVision Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.13.5 SinoVision Recent Developments/Updates
9.13.6 SinoVision Competitive Strengths & Weaknesses
9.14 Pingsheng Healthcare
9.14.1 Pingsheng Healthcare Details
9.14.2 Pingsheng Healthcare Major Business
9.14.3 Pingsheng Healthcare Pet DR Product and Services
9.14.4 Pingsheng Healthcare Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.14.5 Pingsheng Healthcare Recent Developments/Updates
9.14.6 Pingsheng Healthcare Competitive Strengths & Weaknesses
9.15 Tutom Animal Medical Equipment
9.15.1 Tutom Animal Medical Equipment Details
9.15.2 Tutom Animal Medical Equipment Major Business
9.15.3 Tutom Animal Medical Equipment Pet DR Product and Services
9.15.4 Tutom Animal Medical Equipment Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.15.5 Tutom Animal Medical Equipment Recent Developments/Updates
9.15.6 Tutom Animal Medical Equipment Competitive Strengths & Weaknesses
9.16 DBC Inc.
9.16.1 DBC Inc. Details
9.16.2 DBC Inc. Major Business
9.16.3 DBC Inc. Pet DR Product and Services
9.16.4 DBC Inc. Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.16.5 DBC Inc. Recent Developments/Updates
9.16.6 DBC Inc. Competitive Strengths & Weaknesses
9.17 Mindray Animal Medical
9.17.1 Mindray Animal Medical Details
9.17.2 Mindray Animal Medical Major Business
9.17.3 Mindray Animal Medical Pet DR Product and Services
9.17.4 Mindray Animal Medical Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.17.5 Mindray Animal Medical Recent Developments/Updates
9.17.6 Mindray Animal Medical Competitive Strengths & Weaknesses
9.18 Neusoft Medical

+357 96 030922
info@marketpublishers.com

9.18.1 Neusoft Medical Details
9.18.2 Neusoft Medical Major Business
9.18.3 Neusoft Medical Pet DR Product and Services
9.18.4 Neusoft Medical Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.18.5 Neusoft Medical Recent Developments/Updates
9.18.6 Neusoft Medical Competitive Strengths & Weaknesses
9.19 United Imaging Healthcare
9.19.1 United Imaging Healthcare Details
9.19.2 United Imaging Healthcare Major Business
9.19.3 United Imaging Healthcare Pet DR Product and Services
9.19.4 United Imaging Healthcare Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.19.5 United Imaging Healthcare Recent Developments/Updates
9.19.6 United Imaging Healthcare Competitive Strengths & Weaknesses
9.20 Minfound
9.20.1 Minfound Details
9.20.2 Minfound Major Business
9.20.3 Minfound Pet DR Product and Services
9.20.4 Minfound Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.20.5 Minfound Recent Developments/Updates
9.20.6 Minfound Competitive Strengths & Weaknesses
9.21 Vetoo Med
9.21.1 Vetoo Med Details
9.21.2 Vetoo Med Major Business
9.21.3 Vetoo Med Pet DR Product and Services
9.21.4 Vetoo Med Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.21.5 Vetoo Med Recent Developments/Updates
9.21.6 Vetoo Med Competitive Strengths & Weaknesses
9.22 Dawei Veterinary Medical
9.22.1 Dawei Veterinary Medical Details
9.22.2 Dawei Veterinary Medical Major Business
9.22.3 Dawei Veterinary Medical Pet DR Product and Services
9.22.4 Dawei Veterinary Medical Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.22.5 Dawei Veterinary Medical Recent Developments/Updates
9.22.6 Dawei Veterinary Medical Competitive Strengths & Weaknesses

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9.23 Wandong Medical
9.23.1 Wandong Medical Details
9.23.2 Wandong Medical Major Business
9.23.3 Wandong Medical Pet DR Product and Services
9.23.4 Wandong Medical Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.23.5 Wandong Medical Recent Developments/Updates
9.23.6 Wandong Medical Competitive Strengths & Weaknesses
9.24 BK Healthcare
9.24.1 BK Healthcare Details
9.24.2 BK Healthcare Major Business
9.24.3 BK Healthcare Pet DR Product and Services
9.24.4 BK Healthcare Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.24.5 BK Healthcare Recent Developments/Updates
9.24.6 BK Healthcare Competitive Strengths & Weaknesses
9.25 iPetMed
9.25.1 iPetMed Details
9.25.2 iPetMed Major Business
9.25.3 iPetMed Pet DR Product and Services
9.25.4 iPetMed Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.25.5 iPetMed Recent Developments/Updates
9.25.6 iPetMed Competitive Strengths & Weaknesses
9.26 Bizvet
9.26.1 Bizvet Details
9.26.2 Bizvet Major Business
9.26.3 Bizvet Pet DR Product and Services
9.26.4 Bizvet Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.26.5 Bizvet Recent Developments/Updates
9.26.6 Bizvet Competitive Strengths & Weaknesses
9.27 DT Healthcare
9.27.1 DT Healthcare Details
9.27.2 DT Healthcare Major Business
9.27.3 DT Healthcare Pet DR Product and Services
9.27.4 DT Healthcare Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.27.5 DT Healthcare Recent Developments/Updates

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9.27.6 DT Healthcare Competitive Strengths & Weaknesses
9.28 Ruishi Medical
9.28.1 Ruishi Medical Details
9.28.2 Ruishi Medical Major Business
9.28.3 Ruishi Medical Pet DR Product and Services
9.28.4 Ruishi Medical Pet DR Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.28.5 Ruishi Medical Recent Developments/Updates
9.28.6 Ruishi Medical Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Pet DR Industry Chain
10.2 Pet DR Upstream Analysis
10.2.1 Pet DR Core Raw Materials
10.2.2 Main Manufacturers of Pet DR Core Raw Materials
10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 Pet DR Production Mode
10.6 Pet DR Procurement Model
10.7 Pet DR Industry Sales Model and Sales Channels
10.7.1 Pet DR Sales Model
10.7.2 Pet DR Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

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List Of Tables

LIST OF TABLES

Table 1. World Pet DR Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World Pet DR Production Value by Region (2021-2026) & (USD Million)
Table 3. World Pet DR Production Value by Region (2027-2032) & (USD Million)
Table 4. World Pet DR Production Value Market Share by Region (2021-2026)
Table 5. World Pet DR Production Value Market Share by Region (2027-2032)
Table 6. World Pet DR Production by Region (2021-2026) & (K Units)
Table 7. World Pet DR Production by Region (2027-2032) & (K Units)
Table 8. World Pet DR Production Market Share by Region (2021-2026)
Table 9. World Pet DR Production Market Share by Region (2027-2032)
Table 10. World Pet DR Average Price by Region (2021-2026) & (US$/Unit)
Table 11. World Pet DR Average Price by Region (2027-2032) & (US$/Unit)
Table 12. Pet DR Major Market Trends
Table 13. World Pet DR Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)
Table 14. World Pet DR Consumption by Region (2021-2026) & (K Units)
Table 15. World Pet DR Consumption Forecast by Region (2027-2032) & (K Units)
Table 16. World Pet DR Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key Pet DR Producers in 2025
Table 18. World Pet DR Production by Manufacturer (2021-2026) & (K Units)
Table 19. Production Market Share of Key Pet DR Producers in 2025
Table 20. World Pet DR Average Price by Manufacturer (2021-2026) & (US$/Unit)
Table 21. Global Pet DR Company Evaluation Quadrant
Table 22. World Pet DR Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and Pet DR Production Site of Key Manufacturer
Table 24. Pet DR Market: Company Product Type Footprint
Table 25. Pet DR Market: Company Product Application Footprint
Table 26. Pet DR Competitive Factors
Table 27. Pet DR New Entrant and Capacity Expansion Plans
Table 28. Pet DR Mergers & Acquisitions Activity
Table 29. United States VS China Pet DR Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Pet DR Production Comparison, (2021 & 2025 & 2032) & (K Units)

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Table 31. United States VS China Pet DR Consumption Comparison, (2021 & 2025 & 2032) & (K Units)
Table 32. United States Based Pet DR Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Pet DR Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Pet DR Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Pet DR Production (2021-2026) & (K Units)
Table 36. United States Based Manufacturers Pet DR Production Market Share (2021-2026)
Table 37. China Based Pet DR Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Pet DR Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers Pet DR Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers Pet DR Production, (2021-2026) & (K Units)
Table 41. China Based Manufacturers Pet DR Production Market Share (2021-2026)
Table 42. Rest of World Based Pet DR Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers Pet DR Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Pet DR Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Pet DR Production, (2021-2026) & (K Units)
Table 46. Rest of World Based Manufacturers Pet DR Production Market Share (2021-2026)
Table 47. World Pet DR Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World Pet DR Production by Type (2021-2026) & (K Units)
Table 49. World Pet DR Production by Type (2027-2032) & (K Units)
Table 50. World Pet DR Production Value by Type (2021-2026) & (USD Million)
Table 51. World Pet DR Production Value by Type (2027-2032) & (USD Million)
Table 52. World Pet DR Average Price by Type (2021-2026) & (US$/Unit)
Table 53. World Pet DR Average Price by Type (2027-2032) & (US$/Unit)
Table 54. World Pet DR Production Value by Detector Size, (USD Million), 2021 & 2025 & 2032

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Table 55. World Pet DR Production by Detector Size (2021-2026) & (K Units)
Table 56. World Pet DR Production by Detector Size (2027-2032) & (K Units)
Table 57. World Pet DR Production Value by Detector Size (2021-2026) & (USD Million)
Table 58. World Pet DR Production Value by Detector Size (2027-2032) & (USD Million)
Table 59. World Pet DR Average Price by Detector Size (2021-2026) & (US$/Unit)
Table 60. World Pet DR Average Price by Detector Size (2027-2032) & (US$/Unit)
Table 61. World Pet DR Production Value by Detector Materials, (USD Million), 2021 & 2025 & 2032
Table 62. World Pet DR Production by Detector Materials (2021-2026) & (K Units)
Table 63. World Pet DR Production by Detector Materials (2027-2032) & (K Units)
Table 64. World Pet DR Production Value by Detector Materials (2021-2026) & (USD Million)
Table 65. World Pet DR Production Value by Detector Materials (2027-2032) & (USD Million)
Table 66. World Pet DR Average Price by Detector Materials (2021-2026) & (US$/Unit)
Table 67. World Pet DR Average Price by Detector Materials (2027-2032) & (US$/Unit)
Table 68. World Pet DR Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World Pet DR Production by Application (2021-2026) & (K Units)
Table 70. World Pet DR Production by Application (2027-2032) & (K Units)
Table 71. World Pet DR Production Value by Application (2021-2026) & (USD Million)
Table 72. World Pet DR Production Value by Application (2027-2032) & (USD Million)
Table 73. World Pet DR Average Price by Application (2021-2026) & (US$/Unit)
Table 74. World Pet DR Average Price by Application (2027-2032) & (US$/Unit)
Table 75. Siemens Healthineers Basic Information, Manufacturing Base and Competitors
Table 76. Siemens Healthineers Major Business
Table 77. Siemens Healthineers Pet DR Product and Services
Table 78. Siemens Healthineers Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 79. Siemens Healthineers Recent Developments/Updates
Table 80. Siemens Healthineers Competitive Strengths & Weaknesses
Table 81. General Electric Basic Information, Manufacturing Base and Competitors
Table 82. General Electric Major Business
Table 83. General Electric Pet DR Product and Services
Table 84. General Electric Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. General Electric Recent Developments/Updates
Table 86. General Electric Competitive Strengths & Weaknesses

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Table 87. Carestream Health Basic Information, Manufacturing Base and Competitors
Table 88. Carestream Health Major Business
Table 89. Carestream Health Pet DR Product and Services
Table 90. Carestream Health Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. Carestream Health Recent Developments/Updates
Table 92. Carestream Health Competitive Strengths & Weaknesses
Table 93. Antech Diagnostics Basic Information, Manufacturing Base and Competitors
Table 94. Antech Diagnostics Major Business
Table 95. Antech Diagnostics Pet DR Product and Services
Table 96. Antech Diagnostics Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Antech Diagnostics Recent Developments/Updates
Table 98. Antech Diagnostics Competitive Strengths & Weaknesses
Table 99. Animage Fidex Basic Information, Manufacturing Base and Competitors
Table 100. Animage Fidex Major Business
Table 101. Animage Fidex Pet DR Product and Services
Table 102. Animage Fidex Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Animage Fidex Recent Developments/Updates
Table 104. Animage Fidex Competitive Strengths & Weaknesses
Table 105. Epica Animal Health Basic Information, Manufacturing Base and Competitors
Table 106. Epica Animal Health Major Business
Table 107. Epica Animal Health Pet DR Product and Services
Table 108. Epica Animal Health Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Epica Animal Health Recent Developments/Updates
Table 110. Epica Animal Health Competitive Strengths & Weaknesses
Table 111. Neurologica Corp Basic Information, Manufacturing Base and Competitors
Table 112. Neurologica Corp Major Business
Table 113. Neurologica Corp Pet DR Product and Services
Table 114. Neurologica Corp Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Neurologica Corp Recent Developments/Updates
Table 116. Neurologica Corp Competitive Strengths & Weaknesses
Table 117. Hitachi Medical Basic Information, Manufacturing Base and Competitors
Table 118. Hitachi Medical Major Business
Table 119. Hitachi Medical Pet DR Product and Services

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Table 120. Hitachi Medical Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. Hitachi Medical Recent Developments/Updates
Table 122. Hitachi Medical Competitive Strengths & Weaknesses
Table 123. Esaote Basic Information, Manufacturing Base and Competitors
Table 124. Esaote Major Business
Table 125. Esaote Pet DR Product and Services
Table 126. Esaote Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Esaote Recent Developments/Updates
Table 128. Esaote Competitive Strengths & Weaknesses
Table 129. Molecubes Basic Information, Manufacturing Base and Competitors
Table 130. Molecubes Major Business
Table 131. Molecubes Pet DR Product and Services
Table 132. Molecubes Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. Molecubes Recent Developments/Updates
Table 134. Molecubes Competitive Strengths & Weaknesses
Table 135. Mediso Medical Basic Information, Manufacturing Base and Competitors
Table 136. Mediso Medical Major Business
Table 137. Mediso Medical Pet DR Product and Services
Table 138. Mediso Medical Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139. Mediso Medical Recent Developments/Updates
Table 140. Mediso Medical Competitive Strengths & Weaknesses
Table 141. Sedecal Basic Information, Manufacturing Base and Competitors
Table 142. Sedecal Major Business
Table 143. Sedecal Pet DR Product and Services
Table 144. Sedecal Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 145. Sedecal Recent Developments/Updates
Table 146. Sedecal Competitive Strengths & Weaknesses
Table 147. SinoVision Basic Information, Manufacturing Base and Competitors
Table 148. SinoVision Major Business
Table 149. SinoVision Pet DR Product and Services
Table 150. SinoVision Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 151. SinoVision Recent Developments/Updates
Table 152. SinoVision Competitive Strengths & Weaknesses

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Table 153. Pingsheng Healthcare Basic Information, Manufacturing Base and Competitors
Table 154. Pingsheng Healthcare Major Business
Table 155. Pingsheng Healthcare Pet DR Product and Services
Table 156. Pingsheng Healthcare Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 157. Pingsheng Healthcare Recent Developments/Updates
Table 158. Pingsheng Healthcare Competitive Strengths & Weaknesses
Table 159. Tutom Animal Medical Equipment Basic Information, Manufacturing Base and Competitors
Table 160. Tutom Animal Medical Equipment Major Business
Table 161. Tutom Animal Medical Equipment Pet DR Product and Services
Table 162. Tutom Animal Medical Equipment Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 163. Tutom Animal Medical Equipment Recent Developments/Updates
Table 164. Tutom Animal Medical Equipment Competitive Strengths & Weaknesses
Table 165. DBC Inc. Basic Information, Manufacturing Base and Competitors
Table 166. DBC Inc. Major Business
Table 167. DBC Inc. Pet DR Product and Services
Table 168. DBC Inc. Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 169. DBC Inc. Recent Developments/Updates
Table 170. DBC Inc. Competitive Strengths & Weaknesses
Table 171. Mindray Animal Medical Basic Information, Manufacturing Base and Competitors
Table 172. Mindray Animal Medical Major Business
Table 173. Mindray Animal Medical Pet DR Product and Services
Table 174. Mindray Animal Medical Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 175. Mindray Animal Medical Recent Developments/Updates
Table 176. Mindray Animal Medical Competitive Strengths & Weaknesses
Table 177. Neusoft Medical Basic Information, Manufacturing Base and Competitors
Table 178. Neusoft Medical Major Business
Table 179. Neusoft Medical Pet DR Product and Services
Table 180. Neusoft Medical Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 181. Neusoft Medical Recent Developments/Updates
Table 182. Neusoft Medical Competitive Strengths & Weaknesses

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Table 183. United Imaging Healthcare Basic Information, Manufacturing Base and Competitors
Table 184. United Imaging Healthcare Major Business
Table 185. United Imaging Healthcare Pet DR Product and Services
Table 186. United Imaging Healthcare Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 187. United Imaging Healthcare Recent Developments/Updates
Table 188. United Imaging Healthcare Competitive Strengths & Weaknesses
Table 189. Minfound Basic Information, Manufacturing Base and Competitors
Table 190. Minfound Major Business
Table 191. Minfound Pet DR Product and Services
Table 192. Minfound Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 193. Minfound Recent Developments/Updates
Table 194. Minfound Competitive Strengths & Weaknesses
Table 195. Vetoo Med Basic Information, Manufacturing Base and Competitors
Table 196. Vetoo Med Major Business
Table 197. Vetoo Med Pet DR Product and Services
Table 198. Vetoo Med Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 199. Vetoo Med Recent Developments/Updates
Table 200. Vetoo Med Competitive Strengths & Weaknesses
Table 201. Dawei Veterinary Medical Basic Information, Manufacturing Base and Competitors
Table 202. Dawei Veterinary Medical Major Business
Table 203. Dawei Veterinary Medical Pet DR Product and Services
Table 204. Dawei Veterinary Medical Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 205. Dawei Veterinary Medical Recent Developments/Updates
Table 206. Dawei Veterinary Medical Competitive Strengths & Weaknesses
Table 207. Wandong Medical Basic Information, Manufacturing Base and Competitors
Table 208. Wandong Medical Major Business
Table 209. Wandong Medical Pet DR Product and Services
Table 210. Wandong Medical Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 211. Wandong Medical Recent Developments/Updates
Table 212. Wandong Medical Competitive Strengths & Weaknesses
Table 213. BK Healthcare Basic Information, Manufacturing Base and Competitors
Table 214. BK Healthcare Major Business

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Table 215. BK Healthcare Pet DR Product and Services
Table 216. BK Healthcare Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 217. BK Healthcare Recent Developments/Updates
Table 218. BK Healthcare Competitive Strengths & Weaknesses
Table 219. iPetMed Basic Information, Manufacturing Base and Competitors
Table 220. iPetMed Major Business
Table 221. iPetMed Pet DR Product and Services
Table 222. iPetMed Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 223. iPetMed Recent Developments/Updates
Table 224. iPetMed Competitive Strengths & Weaknesses
Table 225. Bizvet Basic Information, Manufacturing Base and Competitors
Table 226. Bizvet Major Business
Table 227. Bizvet Pet DR Product and Services
Table 228. Bizvet Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 229. Bizvet Recent Developments/Updates
Table 230. Bizvet Competitive Strengths & Weaknesses
Table 231. DT Healthcare Basic Information, Manufacturing Base and Competitors
Table 232. DT Healthcare Major Business
Table 233. DT Healthcare Pet DR Product and Services
Table 234. DT Healthcare Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 235. DT Healthcare Recent Developments/Updates
Table 236. DT Healthcare Competitive Strengths & Weaknesses
Table 237. Ruishi Medical Basic Information, Manufacturing Base and Competitors
Table 238. Ruishi Medical Major Business
Table 239. Ruishi Medical Pet DR Product and Services
Table 240. Ruishi Medical Pet DR Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 241. Ruishi Medical Recent Developments/Updates
Table 242. Ruishi Medical Competitive Strengths & Weaknesses
Table 243. Global Key Players of Pet DR Upstream (Raw Materials)
Table 244. Global Pet DR Typical Customers
Table 245. Pet DR Typical Distributors

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List Of Figures

LIST OF FIGURES

Figure 1. Pet DR Picture
Figure 2. World Pet DR Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Pet DR Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World Pet DR Production (2021-2032) & (K Units)
Figure 5. World Pet DR Average Price (2021-2032) & (US$/Unit)
Figure 6. World Pet DR Production Value Market Share by Region (2021-2032)
Figure 7. World Pet DR Production Market Share by Region (2021-2032)
Figure 8. North America Pet DR Production (2021-2032) & (K Units)
Figure 9. Europe Pet DR Production (2021-2032) & (K Units)
Figure 10. China Pet DR Production (2021-2032) & (K Units)
Figure 11. Japan Pet DR Production (2021-2032) & (K Units)
Figure 12. Pet DR Market Drivers
Figure 13. Factors Affecting Demand
Figure 14. World Pet DR Consumption (2021-2032) & (K Units)
Figure 15. World Pet DR Consumption Market Share by Region (2021-2032)
Figure 16. United States Pet DR Consumption (2021-2032) & (K Units)
Figure 17. China Pet DR Consumption (2021-2032) & (K Units)
Figure 18. Europe Pet DR Consumption (2021-2032) & (K Units)
Figure 19. Japan Pet DR Consumption (2021-2032) & (K Units)
Figure 20. South Korea Pet DR Consumption (2021-2032) & (K Units)
Figure 21. ASEAN Pet DR Consumption (2021-2032) & (K Units)
Figure 22. India Pet DR Consumption (2021-2032) & (K Units)
Figure 23. Producer Shipments of Pet DR by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 24. Global Four-firm Concentration Ratios (CR4) for Pet DR Markets in 2025
Figure 25. Global Four-firm Concentration Ratios (CR8) for Pet DR Markets in 2025
Figure 26. United States VS China: Pet DR Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 27. United States VS China: Pet DR Production Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Pet DR Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States Based Manufacturers Pet DR Production Market Share 2025
Figure 30. China Based Manufacturers Pet DR Production Market Share 2025
Figure 31. Rest of World Based Manufacturers Pet DR Production Market Share 2025

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Figure 32. World Pet DR Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 33. World Pet DR Production Value Market Share by Type in 2025
Figure 34. Fixed
Figure 35. Mobile
Figure 36. World Pet DR Production Market Share by Type (2021-2032)
Figure 37. World Pet DR Production Value Market Share by Type (2021-2032)
Figure 38. World Pet DR Average Price by Type (2021-2032) & (US$/Unit)
Figure 39. World Pet DR Production Value by Detector Size, (USD Million), 2021 & 2025 & 2032
Figure 40. World Pet DR Production Value Market Share by Detector Size in 2025
Figure 41. 14×17-inch
Figure 42. 17×17-inch
Figure 43. World Pet DR Production Market Share by Detector Size (2021-2032)
Figure 44. World Pet DR Production Value Market Share by Detector Size (2021-2032)
Figure 45. World Pet DR Average Price by Detector Size (2021-2032) & (US$/Unit)
Figure 46. World Pet DR Production Value by Detector Materials, (USD Million), 2021 & 2025 & 2032
Figure 47. World Pet DR Production Value Market Share by Detector Materials in 2025
Figure 48. CsI Flat-panel Detector
Figure 49. GOS Flat-panel Detector
Figure 50. World Pet DR Production Market Share by Detector Materials (2021-2032)
Figure 51. World Pet DR Production Value Market Share by Detector Materials (2021-2032)
Figure 52. World Pet DR Average Price by Detector Materials (2021-2032) & (US$/Unit)
Figure 53. World Pet DR Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 54. World Pet DR Production Value Market Share by Application in 2025
Figure 55. Pet Hospital
Figure 56. Pet Clinic
Figure 57. Other
Figure 58. World Pet DR Production Market Share by Application (2021-2032)
Figure 59. World Pet DR Production Value Market Share by Application (2021-2032)
Figure 60. World Pet DR Average Price by Application (2021-2032) & (US$/Unit)
Figure 61. Pet DR Industry Chain
Figure 62. Pet DR Procurement Model
Figure 63. Pet DR Sales Model
Figure 64. Pet DR Sales Channels, Direct Sales, and Distribution
Figure 65. Methodology
Figure 66. Research Process and Data Source

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