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Global Veterinary Diagnostic Imaging Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Veterinary Diagnostic Imaging market size is expected to reach $ 2192 million by 2032, rising at a market growth of 6.7% CAGR during the forecast period (2026-2032).

Veterinary Diagnostic Imaging refers to medical imaging equipment and integrated imaging systems used to visualize anatomical structures, physiological functions and pathological changes in animals for clinical diagnosis, treatment planning, procedural guidance and disease monitoring. The market primarily covers veterinary digital radiography, ultrasound imaging, computed tomography (CT), magnetic resonance imaging (MRI), fluoroscopy, and nuclear medicine or scintigraphy systems, together with the image acquisition, processing and workflow software directly integrated with these systems. Veterinary Diagnostic Imaging serves companion animals, equine patients, livestock and other animal populations across veterinary hospitals, clinics, specialty and referral centers, diagnostic imaging facilities, universities, research institutions and selected field-care environments. Equipment may be fixed, mobile, portable or handheld and may either be purpose-built for veterinary applications or adapted and optimized for animal anatomy, positioning and clinical workflows. Veterinary-specific system design increasingly emphasizes species-oriented imaging protocols, compact installation, mobility, rapid image acquisition, DICOM/PACS compatibility and simplified clinical operation, reflecting the substantially different patient sizes, examination settings and workflow requirements encountered across veterinary medicine.

Key Findings

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Digital radiography remains the most widely deployed routine veterinary imaging modality

Ultrasound provides real-time imaging across increasingly diverse veterinary clinical applications

Advanced CT and MRI adoption centers on specialty and referral care

Portable imaging systems are expanding equine and field diagnostic workflows

Integrated PACS increasingly connects image acquisition interpretation and clinical workflow

Market Trends

Veterinary Diagnostic Imaging is moving from standalone imaging hardware toward increasingly digital, connected and veterinary-specific systems. In radiography, direct digital radiography is progressively replacing older analog and computed-radiography workflows as clinics prioritize faster image acquisition, immediate image review and easier integration with digital archives. Ultrasound systems are simultaneously becoming more portable, with handheld and compact platforms widening access beyond specialist imaging departments. At the higher end of the market, dedicated veterinary MRI and CT platforms are being engineered around animal anatomy, smaller installation footprints and more standardized veterinary protocols, while equine imaging is developing highly specialized standing and mobile solutions. Across modalities, DICOM connectivity, PACS, cloud-based image access, remote interpretation and software-assisted workflow are becoming increasingly important components of system differentiation rather than secondary accessories.

Market Dynamics

Drivers

Demand for Veterinary Diagnostic Imaging is supported by the continued advancement of companion-animal healthcare, greater use of specialist veterinary services and rising expectations for earlier and more definitive diagnosis. Radiography and ultrasound are core diagnostic tools because they address complementary clinical needs: radiography provides rapid assessment of skeletal structures, thoracic conditions and overall

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anatomical relationships, while ultrasound enables real-time evaluation of soft tissues, blood flow, cardiac function and image-guided procedures. Expansion of veterinary oncology, orthopedics, neurology, emergency medicine and cardiology further increases the clinical value of CT, MRI and advanced ultrasound. Equine practices also create distinct demand for portable radiography, ultrasound and dedicated standing imaging systems where transporting the animal to a conventional imaging suite may be impractical.

Restraints

The main restraint is the substantial difference in economic feasibility between routine and advanced imaging modalities. Digital radiography and portable ultrasound can be incorporated into a relatively broad range of veterinary practices, whereas CT, MRI and nuclear imaging typically require significantly higher equipment investment, specialized installation, maintenance capabilities and clinical expertise. Advanced examinations may also require anesthesia or sedation, dedicated patient handling and trained image interpretation, which can reduce utilization rates in lower-volume practices. The heterogeneous anatomy of different species creates additional requirements for probes, coils, positioning systems, imaging protocols and software optimization, increasing product-development complexity and limiting the extent to which standardized human medical imaging platforms can be transferred directly into veterinary environments.

Opportunities

The largest structural opportunity lies in expanding sophisticated imaging capability beyond large referral hospitals. Compact DR systems, portable X-ray generators, handheld and portable ultrasound, lower-footprint veterinary CT and dedicated MRI platforms can enable general veterinary practices and regional specialty clinics to internalize procedures previously referred externally. Emerging markets also provide opportunities for equipment suppliers able to combine competitive acquisition costs with reliable image quality, service support and simplified workflows. In parallel, integrating imaging hardware with PACS, cloud archives and remote specialist interpretation can increase equipment utilization and diagnostic confidence, particularly where board-certified veterinary radiologists are not available on site. Equine and large-animal imaging represents another differentiated opportunity because mobility and species-specific system design can create substantial value beyond conventional hospital-based equipment.

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Challenges

Veterinary imaging manufacturers must balance image quality, clinical functionality and affordability across customers whose procedure volumes and purchasing power vary substantially. Species diversity makes protocol standardization more difficult than in human imaging and requires extensive optimization for different body sizes, anatomical regions and clinical indications. At the same time, advanced equipment has relatively long replacement cycles, making new-system sales dependent on both new-site installations and convincing existing users that workflow, dose, portability or image-quality improvements justify upgrades. Manufacturers also face growing expectations for local technical service, operator education, software updates and interoperability. As hardware performance converges in mature modalities, sustaining differentiation increasingly depends on veterinary-specific workflow design and long-term customer support rather than imaging specifications alone.

Industry Chain Analysis

The Veterinary Diagnostic Imaging industry chain begins with specialized imaging components and technologies, including X-ray tubes and high-frequency generators, flat-panel detectors, ultrasound transducers, signal-processing electronics, CT detectors and gantries, MRI magnets, gradient systems and radio-frequency coils, gamma-camera components, computing hardware and image-processing software. Midstream suppliers integrate these components into veterinary radiography, ultrasound, CT, MRI and nuclear imaging platforms and adapt system mechanics, patient tables, probes, coils, positioning tools and software protocols to different animal species. System integration, calibration, image-processing algorithms, regulatory quality management and veterinary workflow optimization are major value-creation activities. Downstream demand originates from veterinary hospitals, general practices, specialist and referral centers, diagnostic imaging centers, equine practices, universities, research institutions and other animal-care facilities. Beyond initial equipment sales, installation, maintenance, operator training, software integration and technical support materially influence customer purchasing decisions and lifecycle value.

Segment Insights

Routine Veterinary Diagnostic Imaging remains centered on digital radiography and

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ultrasound because both modalities combine broad clinical utility with relatively accessible installation and workflow requirements. Radiography is the most established imaging modality in veterinary medicine and is widely used for skeletal, thoracic and abdominal examinations, while ultrasound adds real-time soft-tissue, cardiac, vascular and interventional capabilities. Within these categories, the product mix is shifting toward wireless DR detectors, compact systems and portable or handheld platforms that shorten examination workflows and enable imaging outside dedicated radiology rooms.

CT and MRI occupy a more specialized segment but offer higher diagnostic capability for complex neurological, orthopedic, oncological and cross-sectional imaging applications. Dedicated veterinary systems are reducing some historical barriers through species-specific designs, more compact configurations and optimized examination protocols. Nuclear medicine and scintigraphy remain narrower specialist modalities, with applications such as bone, thyroid, renal and equine examinations. From an animal-segment perspective, companion animals form the broadest addressable clinical base, while equine imaging supports a distinct equipment ecosystem emphasizing mobility, standing examinations and specialized musculoskeletal diagnosis.

Downstream Market Opportunities

Veterinary hospitals and specialty or referral centers represent the primary opportunity for multi-modality imaging investment because they handle higher case complexity and can support CT, MRI and advanced ultrasound utilization. General veterinary clinics create broader unit demand for digital radiography and ultrasound, particularly where equipment is positioned as an in-house diagnostic capability that reduces external referrals and accelerates clinical decision-making. Increasing integration between image acquisition and PACS also allows smaller facilities to capture images locally while accessing specialist interpretation remotely, expanding the practical addressable market for imaging hardware.

Outside companion-animal practice, equine medicine offers an important specialized opportunity for portable DR, ultrasound, standing MRI, standing CT and scintigraphy. Farm and livestock environments favor robust portable ultrasound and radiographic solutions where mobility, battery operation and rapid setup are important purchasing considerations. Universities, veterinary schools and research institutions support demand for advanced and multi-modality systems, while zoos and wildlife-care organizations create smaller but technically demanding applications requiring flexible

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equipment capable of accommodating unusually diverse anatomy and patient sizes.

Regional Insights

North America represents a highly developed Veterinary Diagnostic Imaging environment characterized by extensive companion-animal healthcare infrastructure, specialist referral practices, teleradiology and broad availability of digital imaging technologies. The market increasingly values integrated imaging ecosystems combining equipment, PACS, education, technical support and specialist interpretation. Europe similarly supports advanced veterinary imaging adoption and has a strong supplier base in veterinary radiography, MRI, CT and nuclear imaging, with dedicated systems addressing both companion-animal and equine applications.

Asia-Pacific presents a different opportunity profile, combining rapidly modernizing veterinary clinics with a growing regional manufacturing base for ultrasound and other imaging platforms. Product affordability, portability and scalable system configurations are particularly important for expanding penetration beyond major metropolitan specialty hospitals. Latin America, the Middle East and Africa remain more heterogeneous, with demand generally weighted toward clinically versatile and lower-investment modalities such as digital radiography and ultrasound, while CT and MRI adoption is more concentrated in larger urban hospitals and referral centers.

Competitive Landscape Analysis

The competitive landscape is fragmented by imaging modality rather than dominated by a single universal supplier. Companies with broad veterinary diagnostic platforms increasingly compete through integrated hardware, imaging software, PACS, education and support, while modality specialists differentiate through deeper expertise in radiography, ultrasound, MRI, CT or nuclear medicine. IDEXX combines veterinary digital radiography with dedicated PACS infrastructure, while Antech has developed a broader imaging ecosystem spanning digital radiography, ultrasound, CT-related solutions, PACS and specialist interpretation. The integration of the former Heska business into Mars Petcare's Science & Diagnostics organization has further consolidated Antech's position across veterinary diagnostics, imaging and technology.

A second competitive group is built around specialized imaging technology. Esaote and Hallmarq focus strongly on veterinary MRI and other advanced imaging applications;

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SEDECAL, EXAMION and OR Technology have established veterinary radiography portfolios, with OR Technology additionally combining X-ray, ultrasound and PACS; MiE addresses the specialized veterinary scintigraphy market. Asian manufacturers including Mindray Animal, SonoScape, Edan, Kaixin and CHISON broaden competition in ultrasound and increasingly portable imaging solutions. As core hardware becomes more widely available, competitive advantage is shifting toward veterinary-specific protocols, mobility, installation economics, image-processing quality, system interoperability and post-sale technical support rather than equipment specifications alone.

Report Scope

This report studies the global Veterinary Diagnostic Imaging production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Veterinary Diagnostic Imaging 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 Veterinary Diagnostic Imaging that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Veterinary Diagnostic Imaging total production and demand, 2021-2032, (K Units)

Global Veterinary Diagnostic Imaging total production value, 2021-2032, (USD Million)

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

Global Veterinary Diagnostic Imaging consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Veterinary Diagnostic Imaging domestic production,

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consumption, key domestic manufacturers and share

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

Global Veterinary Diagnostic Imaging production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Veterinary Diagnostic Imaging production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Veterinary Diagnostic Imaging 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 GE, IDEXX Laboratories, Esaote, Antech Diagnostics, Carestream Health, E.I. Medical, Mindray, Hallmarq Veterinary Imaging, Sedecal, Kaixin Electric, 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 Veterinary Diagnostic Imaging market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K Units) and average price (USD/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 Veterinary Diagnostic Imaging Market, By Region:

United States

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China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Veterinary Diagnostic Imaging Market, Segmentation by Type:

X-ray Imaging Systems

Ultrasound

MRI

Other

Global Veterinary Diagnostic Imaging Market, Segmentation by Installation and Mobility:

Fixed Imaging Systems

Mobile-based Imaging Systems

Portable Imaging Systems

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Global Veterinary Diagnostic Imaging Market, Segmentation by End Users:

Veterinary Hospitals and Specialty/Referral Centers

Veterinary Clinics

Veterinary Diagnostic Imaging Centers

Other

Global Veterinary Diagnostic Imaging Market, Segmentation by Application:

Livestock

Pet

Companies Profiled:

GE

IDEXX Laboratories

Esaote

Antech Diagnostics

Carestream Health

E.I. Medical

Mindray

Hallmarq Veterinary Imaging

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Sedecal

Kaixin Electric

Chison

MinXray

FUJIFILM Corporation

SonoScape

Oehm und Rehbein GmbH

EXAMION GmbH

Key Questions Answered

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

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