

# Global Animal CT Market Growth 2026-2032

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## Abstracts

The global Animal CT market size is predicted to grow from US\$ 3778 million in 2025 to US\$ 6281 million in 2032; it is expected to grow at a CAGR of 7.6% from 2026 to 2032.

Animal CT, also known as Veterinary Computed Tomography, is a diagnostic imaging system specifically designed for animals. Similar to human CT, it uses a rotating X-ray source and detector system to acquire projection data from multiple angles and reconstruct cross-sectional, coronal, sagittal and three-dimensional images. Animal CT is widely used to examine skeletal structures, the lungs, abdominal and thoracic organs, the brain, spine, dental structures, tumors and vascular abnormalities. Compared with conventional human CT systems, veterinary CT scanners are generally optimized for the body size and clinical workflow of dogs, cats, rabbits, exotic pets and, in some cases, larger animals. Typical veterinary-specific adaptations include suitable gantry apertures, animal positioning tables, dedicated fields of view, anesthesia-compatible positioning, lower-dose imaging protocols and veterinary imaging software. Some newer systems further integrate CT with static DR, dynamic DR, dental panoramic imaging or even DSA functions to improve equipment utilization in animal hospitals. The major end users include veterinary clinics, referral animal hospitals, veterinary teaching hospitals, research institutions, laboratory animal centers and specialized animal healthcare facilities.

## Key Findings

In 2025, global Animal CT production reached approximately 26k units, with an average global market price of around US\$150k per unit

Companion-animal imaging remains the largest demand source for Animal CT

Spiral CT continues to dominate advanced whole-body veterinary imaging

Veterinary CBCT is gaining adoption in compact and specialty clinical settings

Dedicated veterinary systems are gradually replacing adapted human CT configurations

## **Market Trends**

The Animal CT market is steadily shifting from the historical use of adapted human medical CT systems toward purpose-built veterinary imaging platforms. Product development is increasingly focused on compact design, simplified room requirements, low-dose scanning, faster reconstruction, wider gantry openings and software tailored to animal anatomy and veterinary workflows. Spiral CT remains important for advanced neurological, oncology, thoracic and abdominal imaging, while CBCT is expanding in dental, orthopedic, ear, nasal and surgical-planning applications. Another important trend is functional integration, with some systems combining CT, DR and fluoroscopy in a single platform to improve utilization efficiency. Mobile systems, self-shielded configurations and point-of-care designs are also reducing infrastructure barriers for veterinary clinics. In the large-animal segment, standing CT and larger-bore systems are helping reduce anesthesia requirements and improve examination safety, particularly in equine applications.

## **Market Dynamics**

### **Drivers**

The main market driver is the continued upgrading of veterinary diagnostics from basic radiography and ultrasound toward advanced three-dimensional imaging. Companion-animal healthcare is becoming increasingly specialized, with oncology, neurology, orthopedics, dentistry and complex surgical planning requiring higher-resolution anatomical information. The expansion of veterinary referral hospitals and specialty centers is supporting wider adoption of CT as a routine diagnostic tool rather than a niche premium service. Improved scan speed and veterinary-specific software can also reduce anesthesia time, simplify operation and improve throughput, making CT more practical for daily clinical use. In addition, greater awareness among pet owners regarding advanced diagnostic options is encouraging hospitals to strengthen their imaging capabilities.

### **Restraints**

High capital requirements remain an important restraint on market penetration, especially among small and independent veterinary clinics. Beyond equipment acquisition, hospitals may need to invest in radiation protection, anesthesia equipment, room preparation, maintenance and specialist staffing. CT systems also require regular servicing and component replacement, increasing lifecycle costs. In regions where advanced veterinary insurance and referral systems remain underdeveloped, limited examination volumes can extend equipment payback periods. Another constraint is the shortage of trained veterinary radiologists and imaging specialists, which can reduce effective utilization even where equipment is installed.

## Opportunities

The strongest opportunities are emerging in dedicated companion-animal CT, compact CBCT, mobile CT and large-animal imaging systems. Companion-animal hospitals are continuing to expand advanced diagnostic services, creating room for systems with smaller footprints, simplified installation and easier operation. CBCT has particular potential in dental, orthopedic and head imaging, where high spatial resolution and efficient workflows are highly valued. Large-animal and equine imaging also represents an attractive specialty segment, especially for standing or minimally sedated examinations. In Asia, domestic imaging manufacturers are increasingly introducing veterinary-specific CT platforms, which may broaden market access and accelerate equipment replacement and upgrading in regional veterinary hospitals.

## Challenges

The technical challenge for manufacturers is to deliver high image quality while controlling dose, scan time, motion artifacts and anesthesia requirements across a wide range of animal sizes. Veterinary imaging has greater anatomical variability than human imaging, requiring flexible gantry design, positioning systems and scanning protocols. Manufacturers must also balance performance with affordability because veterinary hospitals are generally more price-sensitive than human medical institutions. After-sales service is another major challenge because CT systems require professional installation, calibration, maintenance and rapid technical support. Companies seeking international expansion therefore need not only competitive hardware but also strong local service and distributor networks.

## Industry Chain Analysis

The upstream Animal CT industry chain includes X-ray tubes, high-voltage generators, detectors, scintillator materials, slip rings, gantry structures, precision mechanical

systems, motion-control components, workstations, GPUs and image-reconstruction software. Midstream companies integrate these components into spiral CT, CBCT, mobile CT and large-animal systems, with value creation increasingly shifting toward detector performance, low-dose algorithms, reconstruction software, veterinary presets, anesthesia-compatible design and multimodality integration. Downstream customers include companion-animal hospitals, veterinary specialty and referral centers, university veterinary hospitals, equine hospitals, research institutions, laboratory animal centers and selected zoological facilities. Beyond equipment sales, installation, service contracts, software upgrades, workstation replacement and image-reading support form an important part of long-term customer value.

## Segment Insights

By technology, Animal CT is primarily divided into Spiral CT and Cone Beam CT. Spiral CT remains the mainstream choice for advanced whole-body imaging because it offers broader anatomical coverage and stronger soft-tissue imaging capability, making it suitable for neurology, oncology, thoracic, abdominal and complex referral cases. Multi-slice systems are especially relevant for hospitals requiring broader diagnostic versatility and higher throughput.

Cone Beam CT is gaining adoption because of its compact design, lower siting requirements and strong spatial resolution. It is particularly suitable for dental, orthopedic, nasal, ear and surgical-planning applications. As veterinary clinics place greater emphasis on equipment accessibility, workflow simplicity and localized imaging, CBCT is expected to expand its role within the broader Animal CT market, while spiral CT should remain more important for comprehensive diagnostic imaging.

## Downstream Market Opportunities

Companion-animal hospitals represent the most important downstream opportunity as advanced imaging increasingly moves from university hospitals and major referral centers into regional specialty and chain veterinary hospitals. Oncology, neurology, orthopedics, dentistry and pre-operative planning are key areas supporting CT adoption. Large-animal and equine hospitals represent a smaller but technically demanding segment, where large-bore, mobile and standing systems offer differentiated clinical value. Research institutions and laboratory animal centers also require high-resolution imaging for anatomical, disease-model and preclinical studies. The broadest commercial opportunity lies in reducing installation complexity and operating costs while preserving sufficient diagnostic capability for routine veterinary use.

## Regional Insights

North America remains one of the most mature Animal CT markets due to its developed veterinary specialty-care ecosystem, strong referral networks and high acceptance of advanced diagnostic imaging. The region has a broad base of veterinary imaging suppliers and relatively high adoption of dedicated veterinary systems. Europe also has established demand in companion-animal specialty medicine and equine imaging, with several markets emphasizing premium veterinary care and advanced diagnostic workflows.

Asia-Pacific is becoming increasingly important as veterinary healthcare infrastructure improves and domestic manufacturers expand their presence in advanced imaging equipment. China is particularly notable for the development of dedicated veterinary CT products by local medical imaging companies, which is helping broaden access beyond top-tier animal hospitals. Japan and South Korea also have relatively sophisticated veterinary care systems, while Southeast Asia remains more concentrated in major metropolitan hospitals and teaching institutions.

## Competitive Landscape Analysis

The Animal CT market has a mixed competitive structure consisting of specialist veterinary imaging manufacturers, veterinary diagnostic equipment providers and established medical imaging companies extending CT technology into veterinary applications. Competition is becoming more multidimensional, with manufacturers differentiating through image quality, compact installation, low-dose performance, scan speed, veterinary-specific software, multimodality integration and after-sales service. Specialist companies often compete through workflow optimization and animal-specific design, while larger medical imaging manufacturers benefit from established CT technology platforms and component capabilities. The market remains relatively fragmented, leaving room for companies focused on compact CBCT, mobile CT, large-animal CT and integrated veterinary imaging systems.

## Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Animal CT Industry Forecast" looks at past sales and reviews total world Animal CT sales in 2025, providing a comprehensive analysis by region and market sector of projected Animal CT sales for 2026 through 2032. With Animal CT sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Animal

CT industry.

This Insight Report provides a comprehensive analysis of the global Animal CT landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Animal CT portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Animal CT market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Animal CT and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Animal CT.

This report presents a comprehensive overview, market shares, and growth opportunities of Animal CT market by product type, application, key manufacturers and key regions and countries.

## **Market Segmentation**

### **Segmentation by Type:**

Fixed

Mobile

### **Segmentation by Number of CT Slices:**

Single-slice CT

4-slice CT

8-slice CT

16-slice CT

32-slice CT

64-slice CT

Others

### **Segmentation by Imaging Principle:**

Spiral CT

Cone Beam CT

### **Segmentation by Application:**

Pets Hospital

Research Institutions

Animal Medical Institutions

Others

### **This report also splits the market by region:**

Americas

United States

Canada

Mexico

Brazil

## APAC

China

Japan

Korea

Southeast Asia

India

Australia

## Europe

Germany

France

UK

Italy

Russia

## Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Siemens Healthineers

General Electric

Carestream Health

Antech Diagnostics

Animage Fidex

Epica Animal Health

Xoran Technologies

Qalibra

Neurologica Corp

Hitachi Medical

Canon Medical

Esaote

Molecubes

Mediso Medical

Sedecal

SinoVision

Pingsheng Healthcare

Tutom Animal Medical Equipment

DBC Inc.

Mindray Animal Medical

Anke High-tech

Neusoft Medical

United Imaging Healthcare

Minfound

Vetoo Med

GoldenStone Medical

Dawei Veterinary Medical

Wandong Medical

MSD Medimage

BK Healthcare

iPetMed

Bizvet

DT Healthcare

Ruishi Medical

## **Key Questions Addressed in this Report**

What is the 10-year outlook for the global Animal CT market?

What factors are driving Animal CT market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Animal CT market opportunities vary by end market size?

How does Animal CT break out by Type, by Application?

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