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Global Veterinary Extracorporeal Shock Wave Therapy Equipment Market Growth 2026-2032

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Abstracts

The global Veterinary Extracorporeal Shock Wave Therapy Equipment market size is predicted to grow from US$ 54.20 million in 2025 to US$ 88.47 million in 2032; it is expected to grow at a CAGR of 7.5% from 2026 to 2032.

Veterinary Extracorporeal Shock Wave Therapy Equipment refers to professional veterinary systems that generate focused shock waves or radial pressure waves outside the animal body and transmit controlled acoustic mechanical energy into targeted bone, tendon, ligament, joint, muscle and other soft-tissue structures. The research scope focuses on complete treatment equipment used for companion animals and equine patients, typically consisting of a control unit, shock wave generator, therapy handpiece, applicators, depth-adjustment components and embedded treatment software. Based on the acoustic field delivered by the complete system, products are classified as Focused Shock Wave Systems, Radial Pressure Wave Systems and Dual Source Systems. Commercial equipment mainly uses electrohydraulic, electromagnetic, piezoelectric or pneumatic ballistic energy-generation technologies and is differentiated by focal geometry, treatment depth, energy stability, pulse frequency, therapy volume, portability and preset veterinary protocols. The equipment is deployed in companion animal hospitals and clinics, dedicated veterinary rehabilitation centers, equine hospitals and referral centers, ambulatory equine services, and veterinary teaching institutions for non-invasive orthopedic treatment, pain management, tissue regeneration and rehabilitation.

Key Findings

Global shipments reached approximately 2,460 units during 2025

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Average selling price was approximately US$22,500 per unit in 2025

North America remained the largest regional demand center in 2025

Radial pressure wave systems led global unit shipments

Companion animal applications represented the fastest expanding demand opportunity

Market Trends

The Veterinary Extracorporeal Shock Wave Therapy Equipment market is evolving from an equine-centered specialist equipment category into a broader veterinary rehabilitation platform serving both large and small animals. Product development is increasingly focused on controlling focal geometry, therapy volume and treatment depth rather than simply increasing peak output. Focused systems are moving toward deeper and more precise energy delivery, while radial pressure wave systems continue to improve portability, setup speed and maintenance economics. Interchangeable stand-offs, multiple treatment heads, software-guided protocols and parameter memory are helping practices standardize treatment across animals of different sizes. Another important direction is improved treatment comfort. Wider focal zones and small-animal-specific handpieces can reduce central peak intensity and allow selected canine and feline procedures to be performed without routine sedation. Purchasing decisions are therefore shifting from basic output specifications toward clinical versatility, workflow efficiency, serviceability and total lifetime value.

Market Dynamics

Drivers

Demand is supported by the continued expansion of companion animal healthcare, the specialization of veterinary orthopedic and rehabilitation services, and growing adoption of non-invasive treatment methods. The technology first established a strong commercial position in equine sports medicine, where tendon, ligament, bone and back injuries create clear demand for faster recovery and return to activity. Growth is now extending into companion animal osteoarthritis management, postoperative rehabilitation, soft-tissue injury and delayed bone healing. The American Veterinary Medical Association estimated 133,475 veterinarians in the United States in 2025, while the Federation of Veterinarians of Europe reported a large and highly developed veterinary profession across Europe. This broad clinical base supports adoption of

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advanced therapeutic equipment, particularly where one platform can cover multiple orthopedic conditions and generate sufficient case volume to justify the investment.

Restraints

Adoption remains constrained by the acquisition price of professional focused systems, uneven access to specialist training and limited case volume in smaller general practices. Clinical outcomes depend on correct patient selection, energy settings, focal depth and applicator positioning, which increases the importance of training and standardized protocols. Focused technologies require specialized acoustic sources, high-voltage components, precision handpieces and calibration procedures, resulting in higher production and service costs. Radial equipment provides a lower-cost entry point but does not fully reproduce the focal characteristics and deep-tissue reach of focused shock waves. In addition, inconsistent use of the terms shock wave, radial pressure wave and acoustic wave can complicate product comparison and create uncertainty among buyers. These factors lengthen purchasing cycles and increase the importance of clinical education, product demonstrations, dependable maintenance and local technical support.

Opportunities

The most attractive incremental opportunity is the expansion of Veterinary Extracorporeal Shock Wave Therapy Equipment from established equine users into companion animal hospitals, orthopedic referral practices and independent rehabilitation centers. Small-animal-specific systems and treatment heads are making routine use in dogs and cats more practical, while sedation-free protocols can improve appointment efficiency and reduce procedural barriers. Compact and mobile configurations also create opportunities among ambulatory equine veterinarians, regional clinics and field-service providers that cannot support large fixed installations. Asia-Pacific offers additional potential as local manufacturers expand veterinary-specific product ranges, lower entry prices and improve regional service coverage. Product opportunities include multi-species platforms, wider therapy volumes, easier depth adjustment, software-guided protocols and systems combining focused and radial treatment sources. Suppliers that link equipment sales with onboarding, clinical training, maintenance and long-term technical support are better positioned to improve utilization and customer retention.

Challenges

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The principal long-term challenge is maintaining consistent clinical performance across different animal sizes, anatomical structures and treatment indications. Equipment varies materially in acoustic field, focal shape, energy measurement, penetration depth and applicator design, making published specifications difficult to compare directly. Differences in practitioner training and treatment protocols may also create inconsistent utilization and customer perceptions. Lower-priced systems improve accessibility but increase the risk of commoditization, exaggerated specifications and confusion between professional extracorporeal shock wave equipment and less capable acoustic therapy devices. Manufacturers must balance affordability with calibration accuracy, handpiece durability, quality-system compliance and reliable after-sales support. International expansion adds further complexity because product registration, distributor capability and acceptable clinical claims differ by region. For smaller manufacturers, maintaining clinical documentation and a dependable service network may ultimately be more difficult than developing the underlying hardware.

Industry Chain Analysis

The upstream industry chain includes electrohydraulic electrodes and reflectors, electromagnetic coils, piezoelectric ceramic elements, high-voltage power modules, pneumatic compressors, projectiles, therapy handpieces, applicators, control electronics, displays, mechanical enclosures and embedded software. Focused systems depend heavily on acoustic-source design, pressure-field control, precision manufacturing and calibration, while radial systems place greater emphasis on pneumatic stability, projectile-handpiece durability and repeatable surface energy transmission. Medical-device quality systems, electrical safety testing, acoustic measurement and software verification are also important enabling capabilities. Suppliers that internally control the shock wave source, handpiece structure and control algorithms generally retain greater influence over product performance, intellectual property and lifecycle service requirements.

The midstream covers system design, component integration, assembly, calibration, regulatory registration, treatment-software development, clinical protocol design and distributor training. Value creation is concentrated in stable energy delivery, adjustable treatment depth, treatment-head life, workflow design, clinical documentation and after-sales service rather than in the enclosure or display alone. The downstream market consists of companion animal hospitals and clinics, independent rehabilitation centers, equine hospitals and referral centers, ambulatory equine practices, teaching hospitals and research institutions. Premium focused-system economics are supported by proprietary acoustic sources, deeper treatment capability and established service

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networks. Radial systems generally face stronger price competition and offer greater manufacturing scalability, while OEM and ODM production is more visible in the middle and lower price tiers.

Segment Insights

By product type, Radial Pressure Wave Systems form the largest unit-volume segment because of their lower acquisition cost, compact configuration and easier deployment in general veterinary practices and mobile services. Their market value contribution is lower than their shipment contribution because average selling prices are comparatively modest. Focused Shock Wave Systems occupy the premium segment and contribute a substantially higher share of market value than of unit shipments. They are preferred where precise focal targeting, deeper tissue penetration and treatment of bone, deep tendon, ligament or joint structures are important. Dual Source Systems remain a smaller specialist segment, combining focused and radial treatment capabilities within one purchasing platform. The segment has clinical flexibility but faces a higher purchase price and more complex service requirements.

By maximum treatment depth, systems with penetration of up to 50 millimeters are mainly associated with radial treatment and superficial structures, while systems exceeding 50 millimeters serve deeper tendon, ligament, joint and bone targets. Premium focused veterinary platforms can provide therapeutic penetration exceeding 125 millimeters, and selected piezoelectric configurations can reach deeper anatomical targets in large animals. By downstream application, equine hospitals, referral centers and ambulatory services form the established commercial base, whereas companion animal hospitals, clinics and rehabilitation centers represent the more dynamic expansion segment. The report classifies application demand by the primary purchasing institution rather than by individual disease indication because one system can address tendon, ligament, joint, bone, muscle and wound-related cases.

Downstream Market Opportunities

Downstream growth depends less on the number of potential clinical indications than on whether veterinary institutions can generate sufficient case volume and regular equipment utilization. Companion animal orthopedic and rehabilitation practices represent an important opportunity because one system can support chronic osteoarthritis management, soft-tissue injury treatment, postoperative recovery, delayed bone healing and selected wound cases. Independent rehabilitation centers can integrate shock wave therapy with therapeutic exercise, hydrotherapy and other non-

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invasive modalities, while larger hospitals can incorporate it into orthopedic surgery, sports medicine and pain-management pathways. In equine care, mobile equipment remains important because treatment is often delivered at stables, training centers and competition venues. Suppliers that provide structured onboarding, indication-based protocols and continuing technical support are more likely to convert initial clinical interest into routine use and repeat purchases.

Regional Insights

North America is the largest regional market for Veterinary Extracorporeal Shock Wave Therapy Equipment, supported by an established equine treatment base, a large companion animal veterinary sector, specialist referral networks and direct commercial coverage by leading veterinary technology suppliers. The United States had an estimated 133,475 veterinarians in 2025, providing a substantial professional customer base. Equine adoption is comparatively mature, while companion animal penetration remains less developed and therefore provides further expansion potential. Europe is another major market and the principal center of technology diversity, with commercial electrohydraulic, electromagnetic, piezoelectric and radial platforms. The region benefits from a large private-practice base and developed equine and companion animal healthcare systems.

Asia-Pacific is expected to offer faster expansion from a lower installed base. Japan has an established market for imported equine equipment, while China and South Korea are developing locally manufactured veterinary-specific systems. Chinese manufacturers are active in radial equipment, rehabilitation platforms and cost-efficient OEM production, while Korean suppliers are expanding focused systems for companion animals and equine users. Regional growth will nevertheless depend on practitioner education, distributor quality, product registration and service availability. Latin America, the Middle East and other developing regions remain more distributor-led, with demand concentrated in equine operations, referral hospitals and larger urban companion animal practices rather than broad general-practice adoption.

Competitive Landscape Analysis

The Veterinary Extracorporeal Shock Wave Therapy Equipment market is specialized and moderately fragmented. Competition is structured primarily around technology capability rather than manufacturing scale alone. Established North American suppliers benefit from equine installed bases, direct clinical relationships and proprietary electrohydraulic platforms. European manufacturers offer the broadest technology mix,

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spanning electrohydraulic, electromagnetic, piezoelectric and radial systems, with differentiation in focal geometry, treatment depth, portability and veterinary-specific protocols. Chinese and South Korean manufacturers are increasing competitive pressure through lower equipment prices, flexible OEM manufacturing, locally developed focused and radial products, and expanding international distribution. Entry barriers remain meaningful because suppliers must combine acoustic-source engineering, repeatable energy output, quality-system compliance, clinical training and dependable after-sales service. Premium manufacturers are strengthening their positions through wider therapy volumes, small-animal configurations, software-guided workflows and multi-species platforms, while value-oriented manufacturers compete through cost, customization and distributor partnerships. No single supplier holds a dominant position across all technologies, regions and end-user settings.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Veterinary Extracorporeal Shock Wave Therapy Equipment Industry Forecast” looks at past sales and reviews total world Veterinary Extracorporeal Shock Wave Therapy Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected Veterinary Extracorporeal Shock Wave Therapy Equipment sales for 2026 through 2032. With Veterinary Extracorporeal Shock Wave Therapy Equipment sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Veterinary Extracorporeal Shock Wave Therapy Equipment industry.

This Insight Report provides a comprehensive analysis of the global Veterinary Extracorporeal Shock Wave Therapy Equipment 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 Veterinary Extracorporeal Shock Wave Therapy Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Veterinary Extracorporeal Shock Wave Therapy Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Veterinary Extracorporeal Shock Wave Therapy Equipment 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

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inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Veterinary Extracorporeal Shock Wave Therapy Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Veterinary Extracorporeal Shock Wave Therapy Equipment market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Focused Shock Wave Systems

Radial Pressure Wave Systems

Dual Source Systems

Other

Segmentation by Maximum Therapeutic Penetration Depth:

?50 mm

>50–125 mm

>125 mm

Not Disclosed

Segmentation by Application:

Companion Animal Hospitals and Clinics

Dedicated Veterinary Rehabilitation Centers

Equine Hospitals and Referral Centers

Equine Ambulatory and Field Services

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Veterinary Teaching Hospitals and Research Centers

Other

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

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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.

Zomedica Corp.

STORZ MEDICAL AG

Richard Wolf GmbH

MTS Medical AG

Switalis GmbH

?nceler Medikal Ltd.

Medispec Ltd.

Curative Sound, LLC

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LiKAMED GmbH

DOMINO S.r.l.

TUR Therapietechnik GmbH

HNT MEDICAL Co., Ltd.

Top Quality Group S.r.l.

Beijing Chieftain Control Technology Group Co., Ltd.

HealEasy Medical Equipment Corp. Ltd.

Rhein Laser Technologies Co., Ltd.

Guangzhou Kapha Electronic Technology Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Veterinary Extracorporeal Shock Wave Therapy Equipment market?

What factors are driving Veterinary Extracorporeal Shock Wave Therapy Equipment market growth, globally and by region?

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

How do Veterinary Extracorporeal Shock Wave Therapy Equipment market opportunities vary by end market size?

How does Veterinary Extracorporeal Shock Wave Therapy Equipment break out by Type, by Application?

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