

# **Veterinary Surgical Instrument Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type**

<https://marketpublishers.com/r/V0060348BA40EN.html>

Date: May 2025

Pages: 89

Price: US\$ 3,200.00 (Single User License)

ID: V0060348BA40EN

## **Abstracts**

### **Veterinary Surgical Instruments Market Summary**

#### **Introduction**

Veterinary surgical instruments, including handheld devices and electrosurgery instruments, are critical for performing precise surgical procedures on companion animals and livestock. These tools support a range of surgeries, from orthopedic to soft tissue procedures, driven by the global pet care market, valued at USD 261 billion in 2022, and increasing animal welfare standards. Innovations like ergonomic designs and advanced electrosurgery enhance precision and safety. The global veterinary surgical instruments market is projected to reach between USD 1.0 billion and USD 1.8 billion in 2025, with a compound annual growth rate (CAGR) of 5.5% to 9.1% through 2030.

#### **Regional Analysis**

North America: The U.S. dominates due to high surgical volumes, with Canada focusing on livestock surgeries.

Europe: Germany and the UK lead with advanced veterinary practices.

Asia Pacific: China and India drive growth through expanding pet care, while Japan emphasizes precision instruments.

Rest of the World: Brazil invests in large animal surgeries, and Australia prioritizes companion animal care.

## Application Analysis

**Veterinary Hospitals:** Expected growth of 5.6%-9.2%, driven by complex surgeries. Trends focus on electrosurgery adoption.

**Veterinary Clinics:** Projected growth of 5.5%-9.1%, linked to routine procedures. Developments emphasize ergonomic handheld tools.

**Research Laboratories:** Anticipated growth of 5.4%-9.0%, tied to experimental surgeries. Advances prioritize precision instruments.

**Animal Shelters:** Expected growth of 5.3%-8.9%, driven by spay/neuter programs. Trends highlight cost-effective tools.

## Type Analysis

**Handheld Devices:** Expected growth of 5.5%-9.1%, valued for versatility. Trends focus on lightweight, durable designs.

**Electrosurgery Instruments:** Projected growth of 5.7%-9.3%, driven by minimally invasive procedures. Innovations emphasize energy-efficient systems.

## Key Market Players

B. Braun offers comprehensive surgical tools.

Vimian (Movora) specializes in orthopedic instruments.

Jørgen Kruuse A/S provides durable surgical solutions.

J&J delivers advanced surgical devices.

Avante Animal Health focuses on cost-effective tools.

Steris emphasizes sterilization-compatible instruments.

## Market News

In September 2024, Vimian Group acquired iM3, expanding its veterinary dental instrument portfolio.

In June 2023, Mavora integrated NGD operations, enhancing its online surgical instrument offerings.

In April 2021, Mavora joined Vimian, strengthening its MedTech vertical with collaborative R&D opportunities.

## Porter's Five Forces Analysis

**Threat of New Entrants:** Moderate, due to high manufacturing costs and regulatory barriers.

**Threat of Substitutes:** Low, as manual tools are less efficient.

**Bargaining Power of Buyers:** Moderate, with clinics seeking durable instruments, but specialized tools limit options.

**Bargaining Power of Suppliers:** Low, given multiple suppliers for surgical materials.

**Competitive Rivalry:** High, with firms competing on precision and durability both in handheld and electrosurgery instruments.

## Market Opportunities and Challenges

### Opportunities:

The global pet care market, valued at USD 261 billion in 2022, and China's USD 187 billion pet market in 2023 drive surgical demand.

The WHO's focus on high-quality care increased surgical equipment demand by 10% in 2023.

An 8% rise in global veterinary clinics in 2023 supports surgical services.

Large animal surgeries, growing 7% in 2023, boost demand for robust instruments.

Innovations like electrosurgery systems improve outcomes.

Emerging markets in Asia offer growth potential.

#### Challenges:

High costs of advanced instruments limit adoption in developing regions.

Regulatory compliance delays market entry.

Limited veterinary training in low-resource settings hinders use.

Competition from refurbished instruments persists.

Supply chain disruptions affect material availability.

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