

Veterinary Surgical Equipment Market Forecasts to 2034 – Global Analysis By Product (Handheld Surgical Instruments, Electrosurgical Equipment, Sutures, Staplers & Accessories, Surgical Tables & Positioning Systems, Surgical Lighting Systems, Sterilization Equipment, and Other Surgical Equipment), Procedure Type, Surgical Approach, Animal Type, End User, Purchasing Channel, and By Geography

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Abstracts

According to Statistics MRC, the Global Veterinary Surgical Equipment Market is accounted for \$1.8 billion in 2026 and is expected to reach \$3.2 billion by 2034 growing at a CAGR of 7.5% during the forecast period. Veterinary surgical equipment encompasses the specialized instruments, devices, and systems used in surgical procedures for animals, including handheld surgical instruments, electrosurgical equipment, sutures and staplers, surgical tables and positioning systems, surgical lighting systems, sterilization equipment, and other surgical accessories. These products support a wide range of procedures including soft tissue surgery, orthopedic surgery, dental surgery, ophthalmic surgery, reproductive surgery, gastrointestinal surgery, cardiovascular surgery, neurosurgery, and other specialized procedures. The market serves veterinary hospitals, clinics, specialty centers, and academic institutions. Growing pet ownership, increasing demand for advanced surgical care, rising prevalence of chronic diseases in animals, and technological advancements in veterinary surgical techniques are key drivers of market expansion across all regions.

Market Dynamics:

Driver:

Increasing pet ownership and demand for advanced surgical interventions

The rising global pet population and growing demand for sophisticated surgical procedures are primary drivers for the veterinary surgical equipment market. Pet owners increasingly consider their animals as family members and are willing to invest in advanced surgical interventions comparable to human healthcare. The humanization of pets has led to greater expectations for surgical options including minimally invasive procedures, joint replacements, and specialized soft tissue surgeries. As veterinary practices expand surgical capabilities and specialty care becomes more accessible, surgical procedure volumes increase. Growing awareness of treatment options and availability of pet insurance further support market growth, sustaining strong demand across all practice types and surgical specialties.

Restraint:

High equipment costs and limited practice budgets

The significant capital investment required for veterinary surgical equipment and limited practice budgets represent a major restraint for the market. Advanced surgical equipment including electrosurgical units, surgical lighting systems, and specialized instrumentation requires substantial upfront investment. Ongoing maintenance, service contracts, and replacement costs add to ownership expenses. Smaller practices may struggle to justify investment in comprehensive surgical capabilities. Sterilization equipment and surgical table upgrades add capital requirements. These cost barriers may limit equipment adoption, particularly among smaller practices and in developing regions with constrained veterinary budgets.

Opportunity:

Advancements in minimally invasive surgical techniques

Continuous innovation in minimally invasive surgical techniques presents significant opportunities for veterinary surgical equipment market expansion. Laparoscopic and endoscopic procedures offer benefits including reduced patient trauma, faster recovery times, and improved outcomes. The growing availability of veterinary-specific minimally invasive instruments is expanding application possibilities. Training programs and workshops are increasing surgeon proficiency in advanced techniques. As veterinary

surgeons adopt minimally invasive approaches across more procedure types, demand for specialized equipment including cameras, light sources, and dedicated instruments increases, capturing growing market share and expanding the addressable market.

Threat:

Shortage of veterinary surgical specialists and training limitations

The limited availability of board-certified veterinary surgeons and surgical training opportunities poses a significant threat to the market. Complex surgical procedures including orthopedic, cardiovascular, and neurosurgical interventions require specialized training and experience that may not be available in all practices. Academic training programs may not produce sufficient specialists to meet growing demand. Referral to specialty centers may be geographically inaccessible for many pet owners. The shortage of surgeons may limit procedure volumes and equipment utilization. This workforce constraint may limit market growth and accessibility, particularly in underserved regions.

Covid-19 Impact:

The COVID-19 pandemic had a significant impact on the veterinary surgical equipment market. Initial disruptions included reduced veterinary visits, postponement of elective procedures, and supply chain interruptions for surgical instruments and equipment. Elective surgeries were deferred during lockdowns. Veterinary practices adapted with enhanced infection control protocols and prioritized urgent procedures. Post-pandemic, pet ownership and veterinary visits rebounded strongly, with increased demand for surgical services. The crisis reinforced the importance of surgical capabilities and investment in equipment. As pet owners prioritize their animals' health, demand for veterinary surgical procedures continues growing.

The Handheld Surgical Instruments segment is expected to be the largest during the forecast period

The Handheld Surgical Instruments segment is expected to account for the largest market share during the forecast period, driven by their essential role across all surgical procedures and the consistent replacement demand for precision instruments. Handheld instruments including forceps, scalpels, surgical scissors, needle holders, retractors, and clamps are fundamental to every surgical procedure, representing the largest volume of surgical equipment purchases. The segment benefits from established

manufacturing infrastructure and supply chains. Growing procedure volumes across all surgical specialties sustain instrument demand. As practices expand surgical capabilities and maintain instrument inventories, handheld surgical instruments maintain the largest product segment share throughout the forecast period.

The Soft Tissue Surgery segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Soft Tissue Surgery segment is predicted to witness the highest growth rate, fueled by the high volume of soft tissue procedures including gastrointestinal surgeries, reproductive surgeries, and urogenital procedures in veterinary practice. Soft tissue surgeries are among the most common surgical procedures performed, with growing demand for advanced techniques including minimally invasive approaches. The segment benefits from expanding surgical capabilities in general practices. As pet owners increasingly seek surgical solutions for a wide range of conditions, soft tissue surgery volumes continue growing, delivering the fastest procedure type segment growth.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by high pet ownership rates, strong spending on veterinary surgical care, and advanced veterinary healthcare infrastructure. The United States leads regional market growth with substantial investment in veterinary surgical facilities and equipment. High awareness of surgical treatment options and availability of pet insurance support procedure volumes. Strong presence of surgical equipment manufacturers and specialty practices drives innovation. Established referral networks and surgical training programs support market maturity. With high pet spending and advanced surgical capabilities, North America maintains its dominant market position.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by rising pet ownership, increasing disposable incomes, and growing awareness of advanced veterinary surgical care across countries including China, India, Australia, and Southeast Asia. The region's rapidly growing pet population and expanding middle class create substantial demand for veterinary surgical services. Veterinary practice modernization and technology adoption are accelerating. Increasing investment in veterinary education and surgical training is expanding surgical

capabilities. Growing pet insurance adoption supports affordability. As veterinary healthcare develops and surgical services expand, Asia Pacific delivers the fastest veterinary surgical equipment market growth globally.

Key players in the market

Some of the key players in Veterinary Surgical Equipment Market include B. Braun Vet Care GmbH, Covetrus, Inc., J?rgen Kruuse A/S, Sklar Surgical Instruments, GerVetUSA Inc., Eickemeyer GmbH, DRE Veterinary, Dispomed Ltd., IM3 Pty Ltd., Integra LifeSciences Holdings Corporation, Steris plc, Medtronic plc, Patterson Veterinary, Henry Schein Animal Health, and Surgical Holdings Ltd.

Key Developments:

In March 2026, Patterson Veterinary's Equine Division partnered with Curative Sound to expand nationwide commercial access to the CS-Pro VET device, an ultra-portable focused shockwave system used in equine surgical recovery and therapy.

In February 2026, Covetrus and MWI Animal Health entered into a definitive merger agreement valued at \$3.5 billion in enterprise value to create an integrated animal health platform combining MWI's supply chain distribution with Covetrus' technology and pharmacy services.

In June 2025, iM3 opened its 'iM3 ACE' education center in Ireland, providing hands-on training facilities and simulated surgical environments for veterinary professionals performing dental and oral procedures.

Products Covered:

Handheld Surgical Instruments

Electrosurgical Equipment

Sutures, Staplers, and Accessories

Surgical Tables and Positioning Systems

Surgical Lighting Systems

Sterilization Equipment

Other Surgical Equipment

Procedure Types Covered:

Soft Tissue Surgery

Orthopedic Surgery

Dental Surgery

Ophthalmic Surgery

Reproductive Surgery

Gastrointestinal Surgery

Cardiovascular Surgery

Neurosurgery

Other Procedures

Surgical Approaches Covered:

Open Surgery

Minimally Invasive Surgery

Animal Types Covered:

Companion Animals

Livestock Animals

Exotic Animals

End Users Covered:

Veterinary Hospitals

Veterinary Clinics

Academic and Research Institutes

Animal Shelters and Welfare Organizations

Purchasing Channels Covered:

Direct Sales

Medical Distributors

E-Procurement and Online Purchasing

Group Purchasing Organizations (GPOs)

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

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