

# **Veterinary Hospital Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Animal Type (Companion Animals, Farm Animals), By Type (Surgery, Medicine, Consultation), By Sector (Public, Private) Region and Competition, 2019-2029F**

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## **Abstracts**

Global Veterinary Hospital Market was valued at USD 81.12 Billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 6.01% through 2029. The Global Veterinary Hospital Market is a dynamic sector encompassing a wide range of healthcare services and products for animals, catering to their medical needs and well-being. With the growing awareness and importance placed on pet health, coupled with advancements in veterinary medicine and technology, the market has witnessed substantial growth in recent years. Key factors driving this expansion include increasing pet ownership, rising disposable income, and a growing emphasis on preventive care among pet owners. Additionally, the pet humanization trend, where pets are increasingly viewed as family members, has spurred demand for high-quality veterinary services. The market is characterized by a diverse array of players, including veterinary hospitals, clinics, diagnostic laboratories, and pharmaceutical companies, all working together to provide comprehensive care for animals.

Veterinary hospitals serve as primary healthcare centers for pets, offering services such as routine check-ups, vaccinations, surgeries, dental care, and emergency treatments. These hospitals often employ a multidisciplinary approach, with teams of veterinarians, veterinary technicians, and support staff collaborating to deliver optimal care. Technological advancements have revolutionized the veterinary industry, with innovations such as digital imaging, telemedicine, and electronic health records enhancing diagnostic accuracy and treatment outcomes. Moreover, the increasing availability of specialized treatments, such as oncology, dermatology, and orthopedic

surgery, reflects the growing sophistication of veterinary medicine. However, emerging economies in Asia-Pacific and Latin America are witnessing rapid growth, fueled by rising pet adoption rates and improving standards of living. Regulatory initiatives aimed at ensuring the safety and efficacy of veterinary products and services play a crucial role in shaping the market landscape. Furthermore, strategic collaborations, mergers, and acquisitions are commonplace, as companies seek to expand their geographic presence and portfolio offerings. Looking ahead, the Global Veterinary Hospital Market is poised for continued expansion, driven by ongoing urbanization, increasing pet humanization, and a greater focus on preventive healthcare measures for animals. However, challenges such as regulatory compliance, workforce shortages, and cost containment efforts are likely to influence market dynamics in the foreseeable future.

## Key Market Drivers

### Increasing Pet Ownership

Increasing pet ownership is a significant driver fueling the growth of the Global Veterinary Hospital Market. As more people around the world choose to welcome pets into their homes, the demand for veterinary services provided by hospitals and clinics continues to rise. There are several factors contributing to the surge in pet ownership, including changing societal norms, companionship, and the psychological benefits associated with having pets. One of the primary reasons for the increase in pet ownership is the changing dynamics of modern lifestyles. With more people living in urban areas and leading busy lives, pets have become companions that offer solace and emotional support. Pets provide unconditional love and companionship, which is particularly appealing to individuals living alone or those seeking to alleviate stress and loneliness. As a result, many people are choosing to adopt pets, driving up the overall pet ownership rates.

There has been a notable shift in societal attitudes towards pets, with many individuals considering them integral members of their families. Pets are no longer viewed solely as animals but rather as valued companions deserving of love, care, and attention. This shift in mindset has led to increased spending on pet-related products and services, including veterinary care. Pet owners are willing to invest in their pets' health and well-being, leading to higher demand for veterinary services provided by hospitals.

The rise in disposable income levels globally has made it more feasible for individuals to afford pet ownership. As people's purchasing power increases, they are more likely to

allocate funds towards pet-related expenses, including veterinary care. This trend is particularly evident in emerging economies where rising incomes have led to a growing middle class with greater discretionary spending. The increase in pet ownership has resulted in a greater need for veterinary services, ranging from routine check-ups and vaccinations to specialized medical treatments and surgeries. Veterinary hospitals play a crucial role in meeting this demand by providing comprehensive healthcare services for pets. These hospitals are equipped with state-of-the-art facilities, experienced veterinarians, and a wide range of medical services to address the diverse needs of pet owners and their furry companions.

### Growing Awareness of Pet Health

The growing awareness of pet health is a crucial factor contributing to the expansion of the Global Veterinary Hospital Market. Pet owners worldwide are increasingly recognizing the importance of maintaining their pets' health and well-being, leading to a surge in demand for veterinary services provided by hospitals and clinics. This heightened awareness is driven by several factors, including access to information, advancements in veterinary medicine, and changing attitudes towards pet care. One of the primary drivers behind the growing awareness of pet health is the easy access to information facilitated by the internet and social media. Pet owners now have access to a wealth of resources and educational materials that empower them to make informed decisions about their pets' health. They can research various topics such as nutrition, preventive care, common health issues, and treatment options, enabling them to take proactive measures to ensure their pets lead healthy lives. This increased access to information has led to a more educated and engaged pet owner population, driving up demand for veterinary services.

Advancements in veterinary medicine have also played a significant role in raising awareness of pet health. Veterinary research and innovation have led to the development of new treatments, diagnostic tools, and preventive care strategies that improve the quality of life for pets. As veterinarians adopt these advancements and incorporate them into their practices, pet owners become more aware of the available healthcare options for their pets. From advanced surgical procedures and imaging techniques to specialized therapies and dietary supplements, the expanding repertoire of veterinary services offered by hospitals contributes to the growing awareness of pet health.

Changing societal attitudes towards pet care have further fueled the growing awareness of pet health. Pets are increasingly viewed as valued members of the family, deserving

of the same level of care and attention as their human counterparts. This shift in mindset has led to a greater emphasis on preventive healthcare measures, regular veterinary check-ups, and early intervention for potential health issues. Pet owners are willing to invest in their pets' health and well-being, driving demand for veterinary services provided by hospitals.

## Technological Advancements in Veterinary Medicine

Technological advancements in veterinary medicine are revolutionizing the way healthcare is delivered to animals and are playing a significant role in boosting the Global Veterinary Hospital Market. These advancements encompass a wide range of innovations, from diagnostic imaging and laboratory testing to surgical techniques and treatment modalities. As veterinary practices embrace cutting-edge technologies, they are better equipped to provide high-quality care for their patients, driving demand for services offered by veterinary hospitals. One of the most notable advancements in veterinary medicine is the advent of digital imaging technology. Digital radiography, ultrasound, computed tomography (CT), and magnetic resonance imaging (MRI) have revolutionized diagnostic capabilities in veterinary hospitals. These imaging modalities provide detailed and accurate images of internal structures, allowing veterinarians to diagnose a wide range of medical conditions more quickly and accurately. Digital imaging also enables easy sharing of images for consultation with specialists, facilitating collaborative decision-making and improving patient outcomes. In addition to diagnostic imaging, technological advancements have transformed surgical techniques and procedures in veterinary medicine. Minimally invasive surgery, such as laparoscopy and arthroscopy, offers numerous benefits over traditional open surgery, including smaller incisions, reduced postoperative pain, faster recovery times, and fewer complications. Veterinary hospitals equipped with state-of-the-art surgical suites and advanced instrumentation can offer these minimally invasive procedures to their patients, attracting clients seeking the highest standard of care for their pets. Advancements in anesthesia and monitoring technology have improved patient safety during surgical procedures. Modern anesthesia machines and monitoring devices allow veterinarians to closely monitor vital signs such as heart rate, blood pressure, and oxygen saturation, ensuring the well-being of patients throughout the surgical process. Veterinary hospitals that invest in these technologies can provide safer anesthesia protocols and better postoperative care, enhancing the overall patient experience and client satisfaction.

## Key Market Challenges

### Regulatory Hurdles

One of the significant challenges facing the Global Veterinary Hospital Market is navigating complex regulatory requirements. Regulatory frameworks governing veterinary practices vary by region and country, posing compliance challenges for veterinary hospitals operating across different jurisdictions. Adhering to licensing, accreditation, and quality assurance standards can be time-consuming and costly for veterinary hospitals, particularly small and independent practices. Moreover, regulatory changes and updates may require veterinary hospitals to invest in additional training, equipment, or infrastructure to maintain compliance, adding further complexity to their operations.

### Workforce Shortages

Another pressing challenge for the veterinary hospital market is workforce shortages, particularly in specialized fields such as veterinary surgery, oncology, and emergency medicine. The demand for skilled veterinarians, veterinary technicians, and support staff often exceeds the available supply, leading to staffing challenges for veterinary hospitals. Additionally, the veterinary profession faces high rates of burnout and attrition, further exacerbating workforce shortages. Addressing these challenges requires strategic workforce planning, investment in training and education programs, and efforts to improve work-life balance and job satisfaction among veterinary professionals.

### Cost Containment Efforts

Cost containment efforts pose a significant challenge for veterinary hospitals, particularly in the face of rising operating costs and competitive pressures. Veterinary hospitals must balance the need to provide high-quality care with the imperative to manage expenses and maintain profitability. Rising costs associated with labor, equipment, supplies, and facility maintenance can strain veterinary hospital budgets, leading to pricing pressures and margin compression. Moreover, pet owners are increasingly price-sensitive and may seek out alternative healthcare providers or delay seeking veterinary care due to cost concerns. Veterinary hospitals must implement cost containment strategies such as streamlining operations, negotiating favorable vendor contracts, and leveraging technology to improve efficiency and reduce overhead expenses.

### Key Market Trends

## Focus on Preventive Care

The focus on preventive care is emerging as a significant driver in boosting the Global Veterinary Hospital Market. Recognizing the importance of proactive measures in maintaining pet health, veterinary hospitals are increasingly prioritizing preventive care services to meet the evolving needs of pet owners and their furry companions. This shift in focus reflects a broader understanding within the veterinary healthcare community that preventive care not only improves pet health outcomes but also fosters long-term client relationships and drives business growth.

Preventive care encompasses a range of services aimed at identifying and addressing potential health issues before they become serious or life-threatening. These services may include routine wellness exams, vaccinations, parasite control, dental care, nutritional counseling, and behavior assessments. By emphasizing preventive care, veterinary hospitals can empower pet owners to take an active role in their pets' health and well-being, leading to healthier, happier, and more fulfilling lives for pets.

One of the key benefits of preventive care is its ability to detect and address health problems early, when they are most treatable and least costly to manage. Regular wellness exams allow veterinarians to monitor pets' overall health, identify any signs of illness or disease, and recommend appropriate interventions to prevent or mitigate potential health issues. This proactive approach not only improves pet health outcomes but also reduces the need for costly emergency treatments and invasive procedures down the line.

Preventive care helps pet owners make informed decisions about their pets' health and lifestyle choices. Through educational initiatives and personalized recommendations, veterinary hospitals can empower pet owners to provide optimal care for their pets, including proper nutrition, exercise, and preventive medications. By fostering a collaborative relationship between veterinarians and pet owners, preventive care promotes shared decision-making and mutual trust, leading to greater client satisfaction and loyalty.

## Rising Disposable Income and Pet Humanization

The Global Veterinary Hospital Market is experiencing a significant boost from rising disposable incomes and the phenomenon of pet humanization. As economies grow and incomes rise globally, more people are allocating a greater portion of their disposable income towards their pets' health and well-being. Concurrently, pets are increasingly



regarded as integral members of the family, leading to a shift in consumer behavior known as pet humanization. The rise in disposable income allows pet owners to afford higher-quality healthcare services for their pets, including those provided by veterinary hospitals. As people's financial capabilities improve, they are more willing to invest in their pets' health, seeking out comprehensive veterinary care to ensure their furry companions lead long, healthy lives. This trend is particularly evident in developed economies where discretionary spending on pet-related expenses, including veterinary services, is on the rise.

The concept of pet humanization has led to changes in the way pets are perceived and treated within households. Pets are no longer seen merely as animals but as beloved members of the family, deserving of love, care, and attention. This shift in mindset has profound implications for the pet care industry, including the veterinary sector. Pet owners are increasingly inclined to prioritize their pets' health and well-being, seeking out personalized, high-quality healthcare services to meet their pets' needs.

Veterinary hospitals play a crucial role in meeting the demands of pet owners who prioritize their pets' health and well-being. These hospitals provide a wide range of services, including routine check-ups, vaccinations, preventive care, diagnostics, and specialized treatments. Veterinary hospitals equipped with state-of-the-art facilities, experienced veterinarians, and a focus on client-centered care are well-positioned to cater to the needs of pet owners who prioritize their pets' health. Moreover, the trend of pet humanization is driving demand for premium pet care services, including those offered by veterinary hospitals.

## Segmental Insights

### Animal Type Insights

Based on the animal type, companion animals segment emerged as the dominant segment in the global veterinary hospital market in 2023. This is primarily due to the increasing humanization of pets and the growing emphasis on pet health and well-being among pet owners worldwide. Companion animals, including dogs, cats, birds, and small mammals, are regarded as integral members of the family, deserving of the same level of care and attention as their human counterparts. The trend of pet humanization has led to changes in consumer behavior, with pet owners increasingly prioritizing their pets' health and well-being. As a result, there has been a surge in demand for veterinary services, including those provided by hospitals, to cater to the medical needs of companion animals.

## Type Insights

Based on the type, the medicine segment emerged as the dominant segment in the global veterinary hospital market in 2023. The increasing prevalence of various diseases and health conditions among animals has fueled the demand for veterinary medicines. Companion animals, livestock, and exotic animals are susceptible to a wide range of illnesses, infections, and chronic conditions, necessitating the use of pharmaceutical treatments to manage and alleviate their symptoms. Veterinary hospitals play a critical role in diagnosing these conditions and prescribing appropriate medications to address them.

## Regional Insights

North America emerged as the dominant region in the global veterinary hospital market in 2023, holding the largest market share. North America boasts a large and affluent pet-owning population. The region has a strong culture of pet ownership, with a significant portion of households owning one or more pets. This high pet ownership rate translates into robust demand for veterinary services, including those provided by hospitals. Pet owners in North America prioritize their pets' health and well-being, leading to a steady stream of clientele for veterinary hospitals across the region.

## Key Market Players

CVS Group Plc

Greencross Group

National Veterinary Associates, Inc. (NVA)

Pets at Home Group PLC

Mars Incorporated

Animal Hospital, Inc.

All Pets Veterinary Hospital LLC

Innovative Petcare Holdings LLC



Blaine Central Veterinary Clinic

Belltowne Veterinary Center

### Report Scope:

In this report, the Global Veterinary Hospital Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Veterinary Hospital Market, By Animal Type:

Companion Animals

Farm Animals

Veterinary Hospital Market, By Type:

Surgery

Medicine

Consultation

Veterinary Hospital Market, By Sector:

Public

Private

Veterinary Hospital Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Egypt

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Veterinary Hospital Market.

## Available Customizations:

Global Veterinary Hospital Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

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