

# **Veterinary orthopedic Medicine Market - Global Industry Size, Share, Trends, Opportunity and Forecast, Segmented By Product Type (Biologics, Viscosupplements, Pharmaceuticals), By Animal type (Canine, Feline, Equine, Cattle, Swine, Others), By Route of Administration (Oral, Parenteral, Topical), By End Use (Veterinary Hospitals and Clinics, Homecare Settings, Others), By Region & Competition, 2019-2029F**

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## **Abstracts**

Global Veterinary Orthopedic Medicine Market was valued at USD 3.73 Billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 7.82% through 2029. The Global Veterinary Orthopedic Medicine Market encompasses a diverse landscape of products and services aimed at addressing musculoskeletal conditions in animals, ranging from companion pets to livestock. This market is driven by various factors, including the growing pet ownership rates worldwide, increasing awareness about animal health, advancements in veterinary orthopedic procedures and technologies, and the rising prevalence of orthopedic disorders among animals. In 2018, twenty-five of the world's leading veterinary organizations endorsed the 'Global Pet Obesity Initiative Position Statement.' This initiative established a standardized definition of obesity in dogs and cats, introduced a universal body condition score (BCS), and called for the veterinary profession to formally recognize canine and feline obesity as a disease. The market offers a wide array of treatment options, including surgical interventions, orthopedic implants such as plates, screws, and pins, joint replacement procedures, regenerative medicine techniques, and rehabilitation therapies.

The market is witnessing significant innovation with the development of minimally invasive surgical techniques, advanced imaging modalities for accurate diagnosis, and the integration of 3D printing technology for customized implants. Companion animal orthopedics, particularly in dogs and cats, dominate the market share owing to the rising demand for pet healthcare services and the willingness of pet owners to invest in advanced treatment options. However, the livestock sector also contributes substantially to the market, driven by the need to improve productivity and address musculoskeletal issues in animals raised for meat, dairy, and other agricultural purposes.

Geographically, North America and Europe hold significant market shares due to the presence of well-established veterinary healthcare infrastructure, high pet adoption rates, and strong investments in research and development. Emerging economies in Asia Pacific and Latin America are witnessing rapid growth fueled by urbanization, increasing disposable income, and a shift towards pet ownership. However, challenges such as high treatment costs, limited access to advanced veterinary care in rural areas, and stringent regulatory requirements may hinder market growth to some extent. Key players in the global veterinary orthopedic medicine market include veterinary hospitals, clinics, specialty orthopedic centers, medical device manufacturers, pharmaceutical companies, and research institutions. Collaborations, partnerships, and strategic acquisitions are common strategies adopted by these players to expand their product portfolios, enhance their market presence, and cater to the evolving needs of veterinary orthopedic healthcare.

## Key Market Drivers

### Rising Pet Ownership Rates

Rising pet ownership rates are a significant driving force behind the growth of the global veterinary orthopedic medicine market. Across the world, there has been a notable increase in the number of households welcoming pets into their families, whether they be dogs, cats, or other companion animals. This trend is particularly pronounced in urban areas where lifestyles are conducive to pet ownership and where there is greater disposable income to allocate toward pet care.

With pets increasingly viewed as integral members of the family, owners are more inclined to invest in their health and well-being, including addressing orthopedic issues. As pets age alongside their owners, they are susceptible to a range of musculoskeletal conditions such as arthritis, ligament tears, and hip dysplasia. Certain breeds may be

predisposed to orthopedic problems due to genetic factors.

As a result, pet owners are seeking out advanced veterinary care to ensure their pets maintain a good quality of life. This includes orthopedic treatments and procedures aimed at alleviating pain, restoring mobility, and enhancing overall comfort. Veterinary orthopedic medicine offers a range of solutions, from non-invasive therapies such as physical rehabilitation and medication management to more invasive interventions like surgery and orthopedic implants.

The increasing humanization of pets has led to a greater willingness among owners to pursue specialized care options, even if they come at a higher cost. Pet insurance, which has become more prevalent in recent years, also provides financial coverage for veterinary services, making advanced orthopedic treatments more accessible to a broader range of pet owners.

Veterinary clinics and hospitals are responding to this growing demand by expanding their orthopedic service offerings and investing in state-of-the-art equipment and facilities. There has been a surge in research and development efforts focused on advancing orthopedic treatments and technologies tailored specifically for veterinary medicine. Rising pet ownership rates are driving significant growth in the global veterinary orthopedic medicine market. As the bond between humans and their animal companions continues to strengthen, so will the demand for innovative orthopedic solutions to ensure the health and well-being of beloved pets around the world.

### Increasing Awareness about Animal Health

Increasing awareness about animal health is a crucial factor driving the growth of the global veterinary orthopedic medicine market. As pet owners and animal caretakers become more educated about the importance of proactive healthcare for their furry companions, there is a growing recognition of the significance of orthopedic issues in animals and the need for specialized treatments. One of the key drivers behind this heightened awareness is the availability of information through various channels, including the internet, social media, and veterinary professionals. Pet owners are increasingly seeking out information about common health concerns and preventive measures to ensure the well-being of their pets. As a result, they are more likely to recognize signs of musculoskeletal problems, such as limping, difficulty standing or walking, and reluctance to move, prompting them to seek veterinary assistance.

Initiatives by veterinary organizations, animal welfare groups, and government agencies

play a crucial role in raising awareness about orthopedic health in animals. These organizations conduct educational campaigns, workshops, and seminars to educate pet owners, breeders, and animal caregivers about the importance of regular check-ups, proper nutrition, and preventive measures to maintain musculoskeletal health in animals.

The increasing awareness about animal health also extends to the recognition of the emotional and psychological well-being of pets. As pet-human bonds strengthen, owners are more attuned to their pets' physical discomfort and emotional needs. They are inclined to provide the best possible care, including seeking out advanced orthopedic treatments to alleviate pain and improve mobility, thereby enhancing the overall quality of life for their pets.

The rise in pet insurance coverage contributes to greater awareness about the importance of veterinary care, including orthopedic medicine. Pet insurance plans often cover orthopedic procedures and treatments, encouraging pet owners to pursue timely interventions without financial constraints. As awareness about orthopedic health in animals continues to grow, there is a corresponding increase in the demand for veterinary orthopedic medicine. Veterinary clinics and hospitals are seeing a rise in the number of pet owners seeking orthopedic consultations and treatments, leading to an expansion of orthopedic service offerings and investments in advanced orthopedic technologies.

### Rising Prevalence of Orthopedic Disorders Among Animals

The rising prevalence of orthopedic disorders among animals is a key driver behind the growth of the global veterinary orthopedic medicine market. Factors such as aging pet populations, increasing obesity rates, genetic predispositions, and heightened physical activity levels contribute to the growing incidence of orthopedic conditions in animals worldwide. One significant contributor to the increase in orthopedic disorders among animals is the aging pet population. As pets live longer due to advancements in veterinary medicine and improved pet care practices, they become more susceptible to age-related musculoskeletal issues such as arthritis, degenerative joint disease, and age-related ligament tears. These conditions can significantly impact an animal's mobility and quality of life, prompting pet owners to seek veterinary orthopedic care to alleviate pain and improve function.

Obesity is another prevalent factor contributing to the rise in orthopedic disorders among animals. Overweight and obese pets are at a higher risk of developing

orthopedic conditions such as osteoarthritis, as excess weight puts added strain on their joints and ligaments. According to Veterinarian Pet Care, up to 37% of dogs are overweight by the age of six months, challenging the belief that pet obesity is primarily linked to aging. This concerning trend indicates that owners may be contributing to their puppies' early weight issues. Beginning life overweight can have significant long-term effects on dogs. In addition to increasing the likelihood of lifelong obesity, it puts excessive strain on developing bones and joints, potentially leading to painful health complications in the future. With obesity rates on the rise among pets globally, there is a corresponding increase in the demand for orthopedic treatments and interventions aimed at managing and preventing musculoskeletal issues in overweight and obese animals.

Genetic predispositions also play a role in the prevalence of orthopedic disorders among certain breeds of animals. Certain breeds are genetically predisposed to orthopedic conditions such as hip dysplasia, elbow dysplasia, and luxating patella. As these conditions are often hereditary, they can affect animals from a young age and may require lifelong management and treatment. Consequently, pet owners of these breeds are more likely to seek specialized orthopedic care for their animals to address these genetic predispositions and improve their quality of life.

Increased physical activity levels, particularly in working and athletic animals, can predispose them to orthopedic injuries such as ligament tears, fractures, and soft tissue injuries. Activities such as agility training, sports competitions, and working on farms or in service roles can put significant strain on an animal's musculoskeletal system, increasing their risk of orthopedic issues. As the prevalence of orthopedic disorders among animals continues to rise, there is a growing demand for veterinary orthopedic medicine to diagnose, treat, and manage these conditions effectively. Veterinary clinics and hospitals are seeing an influx of pet owners seeking orthopedic consultations, surgeries, and rehabilitation services, driving growth in the global veterinary orthopedic medicine market.

## Key Market Challenges

### Regulatory Hurdles and Compliance

One of the significant challenges hindering the global veterinary orthopedic medicine market is regulatory hurdles and compliance issues. The regulatory landscape for veterinary medical devices and procedures can vary significantly from one country to another, making it challenging for manufacturers to navigate and comply with different

regulatory requirements. This can lead to delays in product approvals, increased regulatory costs, and market access barriers, limiting the availability of advanced orthopedic treatments and technologies in certain regions.

### High Treatment Costs

Another major challenge facing the global veterinary orthopedic medicine market is the high cost associated with orthopedic treatments and procedures. Advanced orthopedic surgeries, implants, and rehabilitation therapies can be expensive, making them unaffordable for some pet owners and veterinary practices. The high treatment costs can deter pet owners from pursuing necessary orthopedic interventions for their animals, leading to suboptimal outcomes and compromised quality of life for affected pets.

### Limited Access to Advanced Veterinary Care

Limited access to advanced veterinary care, particularly in rural and underserved areas, poses a significant challenge to the global veterinary orthopedic medicine market. Veterinary clinics and hospitals equipped with specialized orthopedic facilities and trained professionals are often concentrated in urban centers, leaving rural pet owners with limited access to advanced orthopedic treatments and procedures. This disparity in access to veterinary care can result in delayed diagnoses, inadequate treatment options, and poorer health outcomes for animals in rural communities.

### Shortage of Skilled Veterinary Professionals

A shortage of skilled veterinary professionals specializing in orthopedic medicine is another challenge facing the global veterinary orthopedic medicine market. Orthopedic surgeries and procedures require specialized training and expertise, yet there is a shortage of veterinary surgeons and specialists with the necessary skills and experience to perform these procedures effectively. This shortage can lead to longer wait times for orthopedic consultations and surgeries, as well as increased costs associated with outsourcing orthopedic procedures to specialists.

### Key Market Trends

#### Minimally Invasive Surgical Techniques

Minimally invasive surgical techniques are revolutionizing the field of veterinary



orthopedic medicine and driving significant growth in the global market. These advanced surgical approaches offer numerous benefits over traditional open surgeries, including smaller incisions, reduced tissue trauma, shorter recovery times, and decreased risk of complications. As a result, there is a growing preference among pet owners and veterinary professionals for minimally invasive techniques in the treatment of orthopedic conditions in animals.

One of the key advantages of minimally invasive surgical techniques in veterinary orthopedics is their ability to minimize post-operative pain and discomfort for animals. Smaller incisions result in less tissue damage and nerve disruption, leading to reduced pain during the recovery period. This is particularly beneficial for animals, as it allows them to return to normal activities more quickly and with less reliance on pain medications. Minimally invasive surgical techniques offer faster recovery times compared to traditional open surgeries, allowing animals to resume normal function and mobility sooner. This is especially important for working animals, such as police dogs and search and rescue dogs, whose performance and effectiveness may be compromised by prolonged periods of restricted activity. By minimizing downtime and accelerating the healing process, minimally invasive techniques help optimize the overall health and well-being of animals undergoing orthopedic procedures.

The reduced risk of complications associated with minimally invasive surgical techniques contributes to improved outcomes and higher patient satisfaction rates. With fewer complications, there is less need for follow-up care and interventions, resulting in lower healthcare costs and reduced burden on pet owners and veterinary healthcare providers.

Another factor driving the adoption of minimally invasive techniques in veterinary orthopedics is the advancements in technology and instrumentation that have made these procedures more accessible and effective. High-definition imaging modalities, such as digital radiography and ultrasound, allow for precise visualization of anatomical structures and accurate placement of surgical instruments. Specialized surgical instruments, such as arthroscopes and minimally invasive implants, enable surgeons to perform complex orthopedic procedures with greater precision and control. Minimally invasive surgical techniques are playing a significant role in boosting the global veterinary orthopedic medicine market by offering safer, more effective, and less invasive treatment options for animals with orthopedic conditions. As pet owners and veterinary professionals increasingly recognize the benefits of minimally invasive approaches, the demand for these advanced techniques is expected to continue rising, driving further innovation and growth in the veterinary orthopedic medicine market.

## Focus on Regenerative Medicine

The focus on regenerative medicine is rapidly transforming the landscape of veterinary orthopedic medicine and driving substantial growth in the global market. Regenerative medicine offers innovative treatment modalities that harness the body's natural healing processes to repair and regenerate damaged tissues, providing promising alternatives to traditional surgical interventions. This focus on regenerative medicine is revolutionizing veterinary orthopedics by offering safer, more effective, and less invasive treatment options for animals with musculoskeletal conditions.

One of the key components of regenerative medicine in veterinary orthopedics is stem cell therapy. Stem cells have the remarkable ability to differentiate into various cell types and promote tissue repair and regeneration. In orthopedic applications, stem cell therapy is used to treat a wide range of conditions, including osteoarthritis, ligament and tendon injuries, and cartilage defects. By injecting stem cells directly into the affected area, veterinary orthopedic surgeons can stimulate tissue repair and regeneration, potentially avoiding the need for more invasive surgical procedures.

Platelet-rich plasma (PRP) therapy is another regenerative medicine technique that is gaining popularity in veterinary orthopedics. PRP is derived from the animal's own blood and contains a high concentration of growth factors and cytokines that promote tissue healing and regeneration. In orthopedic applications, PRP therapy is used to accelerate the healing process following injuries or surgical procedures, reduce inflammation, and improve overall tissue quality. PRP injections are typically administered using minimally invasive techniques, such as ultrasound or fluoroscopy guidance, making them an attractive option for pet owners seeking non-surgical treatments for their animals.

Advancements in tissue engineering and biomaterials are driving the development of regenerative medicine approaches that utilize minimally invasive surgical techniques. Scaffolds made from biocompatible materials can be implanted into damaged tissues to provide structural support and promote tissue regeneration. These scaffolds can be delivered using minimally invasive approaches, such as arthroscopy or percutaneous injection, allowing for targeted delivery of regenerative therapies while minimizing trauma to surrounding tissues.

## Segmental Insights

## End-use Insights



Based on the End-use, Veterinary Hospitals and Clinics emerged as the dominant segment in the Global Veterinary Orthopedic Medicine Market in 2023. The dominance of Veterinary Hospitals and Clinics in the Global Veterinary Orthopedic Medicine Market in 2023 can be attributed to their specialized expertise, comprehensive services, and role as referral centers for advanced orthopedic care for animals. As the demand for veterinary orthopedic medicine continues to grow, Veterinary Hospitals and Clinics are expected to maintain their prominent position in providing specialized orthopedic care to animals worldwide. Veterinary hospitals are equipped with specialized facilities, advanced diagnostic equipment, and experienced veterinary orthopedic surgeons, enabling them to offer comprehensive orthopedic services to animals. These hospitals often have dedicated orthopedic departments or specialists who are trained to diagnose and treat a wide range of orthopedic conditions in animals, ranging from fractures and ligament injuries to joint diseases and spinal disorders.

### Regional Insights

North America emerged as the dominated region in the Global Veterinary Orthopedic Medicine Market in 2023, holding the largest market share. North America boasts a large and well-established veterinary healthcare industry with advanced infrastructure, state-of-the-art veterinary hospitals, and specialized orthopedic centers. The region is home to a significant number of veterinary professionals, including orthopedic surgeons, who are trained and experienced in diagnosing and treating a wide range of orthopedic conditions in animals. This extensive network of veterinary professionals and facilities ensures that animals in North America have access to high-quality orthopedic care.

### Key Market Players

Enso Discoveries, LLC

Zoetis, Inc.

Boehringer Ingelheim International GmbH

Elanco Animal Health Inc

Biogenesis Bago SA

American Regent, Inc..

Merck & Co., Inc.

Vetoquinol S.A.

Ceva Sant? Animale

Virbac S.A.

### Report Scope:

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

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#### Veterinary Orthopedic Medicine Market, By Product Type:

Biologics

Viscosupplements

Pharmaceuticals

#### Veterinary Orthopedic Medicine Market, By Animal Type:

Canine

Feline

Equine

Cattle

Swine

Others

### Veterinary Orthopedic Medicine Market, By Route of Administration:

Oral

Parenteral

Topical

### Veterinary Orthopedic Medicine Market, By End use:

Veterinary Hospitals & Clinics

Homecare Settings

Other End Use

### Veterinary Orthopedic Medicine 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 Orthopedic Medicine Market.

Available Customizations:

Global Veterinary Orthopedic Medicine Market report with the given market data,

*Veterinary orthopedic Medicine Market - Global Industry Size, Share, Trends, Opportunity and Forecast, Segmen...*

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).

## Contents

### 1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### 2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

### 3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

### 4. GLOBAL VETERINARY ORTHOPEDIC MEDICINE MARKET OUTLOOK

- 4.1. Market Size & Forecast
  - 4.1.1. By Value
- 4.2. Market Share & Forecast
  - 4.2.1. By Product Type (Biologics, Viscosupplements, Pharmaceuticals)
  - 4.2.2. By Animal type (Canine, Feline, Equine, Cattle, Swine, Others)
  - 4.2.3. By Route of Administration (Oral, Parenteral, Topical)
  - 4.2.4. By End Use (Veterinary Hospitals, Veterinary Clinics, Others)
  - 4.2.5. By Region
  - 4.2.6. By Company (2023)



#### 4.3. Market Map

### **5. ASIA PACIFIC VETERINARY ORTHOPEDIC MEDICINE MARKET OUTLOOK**

#### 5.1. Market Size & Forecast

##### 5.1.1. By Value

#### 5.2. Market Share & Forecast

##### 5.2.1. By Product Type

##### 5.2.2. By Animal type

##### 5.2.3. By Route of Administration

##### 5.2.4. By End Use

##### 5.2.5. By Country

#### 5.3. Asia Pacific: Country Analysis

##### 5.3.1. China Veterinary Orthopedic Medicine Market Outlook

###### 5.3.1.1. Market Size & Forecast

###### 5.3.1.1.1. By Value

###### 5.3.1.2. Market Share & Forecast

###### 5.3.1.2.1. By Product Type

###### 5.3.1.2.2. By Animal type

###### 5.3.1.2.3. By Route of Administration

###### 5.3.1.2.4. By End Use

##### 5.3.2. India Veterinary Orthopedic Medicine Market Outlook

###### 5.3.2.1. Market Size & Forecast

###### 5.3.2.1.1. By Value

###### 5.3.2.2. Market Share & Forecast

###### 5.3.2.2.1. By Product Type

###### 5.3.2.2.2. By Animal type

###### 5.3.2.2.3. By Route of Administration

###### 5.3.2.2.4. By End Use

##### 5.3.3. Australia Veterinary Orthopedic Medicine Market Outlook

###### 5.3.3.1. Market Size & Forecast

###### 5.3.3.1.1. By Value

###### 5.3.3.2. Market Share & Forecast

###### 5.3.3.2.1. By Product Type

###### 5.3.3.2.2. By Animal type

###### 5.3.3.2.3. By Route of Administration

###### 5.3.3.2.4. By End Use

##### 5.3.4. Japan Veterinary Orthopedic Medicine Market Outlook

###### 5.3.4.1. Market Size & Forecast

- 5.3.4.1.1. By Value
- 5.3.4.2. Market Share & Forecast
  - 5.3.4.2.1. By Product Type
  - 5.3.4.2.2. By Animal type
  - 5.3.4.2.3. By Route of Administration
  - 5.3.4.2.4. By End Use
- 5.3.5. South Korea Veterinary Orthopedic Medicine Market Outlook
  - 5.3.5.1. Market Size & Forecast
    - 5.3.5.1.1. By Value
  - 5.3.5.2. Market Share & Forecast
    - 5.3.5.2.1. By Product Type
    - 5.3.5.2.2. By Animal type
    - 5.3.5.2.3. By Route of Administration
    - 5.3.5.2.4. By End Use

## **6. EUROPE VETERINARY ORTHOPEDIC MEDICINE MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Value
- 6.2. Market Share & Forecast
  - 6.2.1. By Product Type
  - 6.2.2. By Animal type
  - 6.2.3. By Route of Administration
  - 6.2.4. By End Use
  - 6.2.5. By Country
- 6.3. Europe: Country Analysis
  - 6.3.1. France Veterinary Orthopedic Medicine Market Outlook
    - 6.3.1.1. Market Size & Forecast
      - 6.3.1.1.1. By Value
    - 6.3.1.2. Market Share & Forecast
      - 6.3.1.2.1. By Product Type
      - 6.3.1.2.2. By Animal type
      - 6.3.1.2.3. By Route of Administration
      - 6.3.1.2.4. By End Use
  - 6.3.2. Germany Veterinary Orthopedic Medicine Market Outlook
    - 6.3.2.1. Market Size & Forecast
      - 6.3.2.1.1. By Value
    - 6.3.2.2. Market Share & Forecast
      - 6.3.2.2.1. By Product Type

- 6.3.2.2.2. By Animal type
- 6.3.2.2.3. By Route of Administration
- 6.3.2.2.4. By End Use
- 6.3.3. Spain Veterinary Orthopedic Medicine Market Outlook
  - 6.3.3.1. Market Size & Forecast
    - 6.3.3.1.1. By Value
  - 6.3.3.2. Market Share & Forecast
    - 6.3.3.2.1. By Product Type
    - 6.3.3.2.2. By Animal type
    - 6.3.3.2.3. By Route of Administration
    - 6.3.3.2.4. By End Use
- 6.3.4. Italy Veterinary Orthopedic Medicine Market Outlook
  - 6.3.4.1. Market Size & Forecast
    - 6.3.4.1.1. By Value
  - 6.3.4.2. Market Share & Forecast
    - 6.3.4.2.1. By Product Type
    - 6.3.4.2.2. By Animal type
    - 6.3.4.2.3. By Route of Administration
    - 6.3.4.2.4. By End Use
- 6.3.5. United Kingdom Veterinary Orthopedic Medicine Market Outlook
  - 6.3.5.1. Market Size & Forecast
    - 6.3.5.1.1. By Value
  - 6.3.5.2. Market Share & Forecast
    - 6.3.5.2.1. By Product Type
    - 6.3.5.2.2. By Animal type
    - 6.3.5.2.3. By Route of Administration
    - 6.3.5.2.4. By End Use

## **7. NORTH AMERICA VETERINARY ORTHOPEDIC MEDICINE MARKET OUTLOOK**

- 7.1. Market Size & Forecast
  - 7.1.1. By Value
- 7.2. Market Share & Forecast
  - 7.2.1. By Product Type
  - 7.2.2. By Animal type
  - 7.2.3. By Route of Administration
  - 7.2.4. By End Use
  - 7.2.5. By Country
- 7.3. North America: Country Analysis

### 7.3.1. United States Veterinary Orthopedic Medicine Market Outlook

#### 7.3.1.1. Market Size & Forecast

##### 7.3.1.1.1. By Value

#### 7.3.1.2. Market Share & Forecast

##### 7.3.1.2.1. By Product Type

##### 7.3.1.2.2. By Animal type

##### 7.3.1.2.3. By Route of Administration

##### 7.3.1.2.4. By End Use

### 7.3.2. Mexico Veterinary Orthopedic Medicine Market Outlook

#### 7.3.2.1. Market Size & Forecast

##### 7.3.2.1.1. By Value

#### 7.3.2.2. Market Share & Forecast

##### 7.3.2.2.1. By Product Type

##### 7.3.2.2.2. By Animal type

##### 7.3.2.2.3. By Route of Administration

##### 7.3.2.2.4. By End Use

### 7.3.3. Canada Veterinary Orthopedic Medicine Market Outlook

#### 7.3.3.1. Market Size & Forecast

##### 7.3.3.1.1. By Value

#### 7.3.3.2. Market Share & Forecast

##### 7.3.3.2.1. By Product Type

##### 7.3.3.2.2. By Animal Type

##### 7.3.3.2.3. By Route of Administration

##### 7.3.3.2.4. By End Use

## **8. SOUTH AMERICA VETERINARY ORTHOPEDIC MEDICINE MARKET OUTLOOK**

### 8.1. Market Size & Forecast

#### 8.1.1. By Value

### 8.2. Market Share & Forecast

#### 8.2.1. By Product Type

#### 8.2.2. By Animal type

#### 8.2.3. By Route of Administration

#### 8.2.4. By End Use

#### 8.2.5. By Country

### 8.3. South America: Country Analysis

#### 8.3.1. Brazil Veterinary Orthopedic Medicine Market Outlook

##### 8.3.1.1. Market Size & Forecast

##### 8.3.1.1.1. By Value

- 8.3.1.2. Market Share & Forecast
  - 8.3.1.2.1. By Product Type
  - 8.3.1.2.2. By Animal type
  - 8.3.1.2.3. By Route of Administration
  - 8.3.1.2.4. By End Use
- 8.3.2. Argentina Veterinary Orthopedic Medicine Market Outlook
  - 8.3.2.1. Market Size & Forecast
    - 8.3.2.1.1. By Value
  - 8.3.2.2. Market Share & Forecast
    - 8.3.2.2.1. By Product Type
    - 8.3.2.2.2. By Animal type
    - 8.3.2.2.3. By Route of Administration
    - 8.3.2.2.4. By End Use
- 8.3.3. Colombia Veterinary Orthopedic Medicine Market Outlook
  - 8.3.3.1. Market Size & Forecast
    - 8.3.3.1.1. By Value
  - 8.3.3.2. Market Share & Forecast
    - 8.3.3.2.1. By Product Type
    - 8.3.3.2.2. By Animal type
    - 8.3.3.2.3. By Route of Administration
    - 8.3.3.2.4. By End Use

## **9. MIDDLE EAST AND AFRICA VETERINARY ORTHOPEDIC MEDICINE MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value
- 9.2. Market Share & Forecast
  - 9.2.1. By Product Type
  - 9.2.2. By Animal type
  - 9.2.3. By Route of Administration
  - 9.2.4. By End Use
  - 9.2.5. By Country
- 9.3. MEA: Country Analysis
  - 9.3.1. South Africa Veterinary Orthopedic Medicine Market Outlook
    - 9.3.1.1. Market Size & Forecast
      - 9.3.1.1.1. By Value
    - 9.3.1.2. Market Share & Forecast
      - 9.3.1.2.1. By Product Type

- 9.3.1.2.2. By Animal type
- 9.3.1.2.3. By Route of Administration
- 9.3.1.2.4. By End Use
- 9.3.2. Saudi Arabia Veterinary Orthopedic Medicine Market Outlook
  - 9.3.2.1. Market Size & Forecast
    - 9.3.2.1.1. By Value
  - 9.3.2.2. Market Share & Forecast
    - 9.3.2.2.1. By Product Type
    - 9.3.2.2.2. By Animal type
    - 9.3.2.2.3. By Route of Administration
    - 9.3.2.2.4. By End Use
- 9.3.3. UAE Veterinary Orthopedic Medicine Market Outlook
  - 9.3.3.1. Market Size & Forecast
    - 9.3.3.1.1. By Value
  - 9.3.3.2. Market Share & Forecast
    - 9.3.3.2.1. By Product Type
    - 9.3.3.2.2. By Animal type
    - 9.3.3.2.3. By Route of Administration
    - 9.3.3.2.4. By End Use
- 9.3.4. Egypt Veterinary Orthopedic Medicine Market Outlook
  - 9.3.4.1. Market Size & Forecast
    - 9.3.4.1.1. By Value
  - 9.3.4.2. Market Share & Forecast
    - 9.3.4.2.1. By Product Type
    - 9.3.4.2.2. By Animal type
    - 9.3.4.2.3. By Route of Administration
    - 9.3.4.2.4. By End Use

## **10. MARKET DYNAMICS**

- 10.1. Drivers
- 10.2. Challenges

## **11. MARKET TRENDS & DEVELOPMENTS**

- 11.1. Recent Developments
- 11.2. Product Launches
- 11.3. Mergers & Acquisitions



## **12. GLOBAL VETERINARY ORTHOPEDIC MEDICINE MARKET: SWOT ANALYSIS**

### **13. PORTER'S FIVE FORCES ANALYSIS**

- 13.1. Competition in the Industry
- 13.2. Potential of New Entrants
- 13.3. Power of Suppliers
- 13.4. Power of Customers
- 13.5. Threat of Substitute Product

### **14. COMPETITIVE LANDSCAPE**

- 14.1. Enso Discoveries, LLC
  - 14.1.1. Company Snapshot
  - 14.1.2. Products & Services
  - 14.1.3. Financials (In case of listed)
  - 14.1.4. Recent Developments
  - 14.1.5. SWOT Analysis
- 14.2. Zoetis, Inc.
- 14.3. Boehringer Ingelheim International GmbH
- 14.4. Elanco Animal Health Inc
- 14.5. Biogenesis Bago SA
- 14.6. American Regent, Inc.
- 14.7. Merck & Co., Inc.
- 14.8. Vetoquinol S.A.
- 14.9. Ceva Sant? Animale
- 14.10. Virbac S.A.

### **15. STRATEGIC RECOMMENDATIONS**

### **16. ABOUT US & DISCLAIMER**

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