

Veterinary Orthopedics Market - Global Industry Size, Share, Trends, Opportunity and Forecast, Segmented By Application (TPLO, TTA, Joint Replacement, Trauma, Other Applications), By Product (Implants, Instruments), By Animal Type (Canine, Feline, Other Animals), By End use (Veterinary Hospitals & Clinics, Other End Use), By Region and Competition, 2019-2029F

<https://marketpublishers.com/r/VE8EAC28959FEN.html>

Date: May 2024

Pages: 180

Price: US\$ 4,900.00 (Single User License)

ID: VE8EAC28959FEN

Abstracts

Global Veterinary Orthopedics Market was valued at USD 566.21 Million in 2023 and is anticipated to project steady growth in the forecast period with a CAGR of 7.08% through 2029. With pets increasingly being regarded as members of the family, there is a heightened focus on ensuring their overall well-being, including orthopedic health. This market encompasses a wide range of orthopedic devices and procedures designed specifically for animals, addressing conditions such as fractures, ligament tears, joint instability, and osteoarthritis. Key segments within the market include implants, external fixation devices, joint replacement systems, orthobiologics, and veterinary orthopedic instrumentation. The market is witnessing significant innovation, with advancements such as 3D printing technology enabling the customization of implants for individual patients, minimally invasive surgical techniques reducing patient recovery times, and the development of biocompatible materials enhancing implant durability and biointegration.

The integration of digital health solutions, such as telemedicine and wearable devices, is facilitating remote monitoring of patients and improving post-operative care. Geographically, North America dominates the market due to the high pet ownership

rates, well-established veterinary infrastructure, and the presence of leading market players. However, the Asia-Pacific region is emerging as a lucrative market, driven by rising disposable incomes, increasing urbanization, and a growing awareness of pet healthcare. The COVID-19 pandemic has also influenced market dynamics, with a surge in pet adoptions and heightened focus on pet health and wellness driving market growth.

Supply chain disruptions and economic uncertainties have posed challenges for market players. Moving forward, the global veterinary orthopedics market is poised for continued growth, fueled by ongoing technological advancements, increasing pet population, and a growing emphasis on preventive and specialized veterinary care. Key opportunities lie in the development of novel treatment modalities, expansion into emerging markets, and strategic collaborations and partnerships between industry players. However, market participants must remain vigilant of regulatory requirements, ensure product safety and efficacy, and adapt to evolving consumer preferences and market dynamics to maintain a competitive edge in this dynamic and rapidly evolving landscape.

Key Market Drivers

Rising Pet Ownership

The global veterinary orthopedics market is experiencing a significant boost due to rising pet ownership trends worldwide. As pets increasingly become integral members of households, pet owners are investing more in their companions' health and well-being, driving demand for specialized veterinary orthopedic solutions. Pet ownership trends have been steadily rising across the globe, fueled by various factors such as changing lifestyles, increasing urbanization, and a growing awareness of the emotional and physical benefits of pet ownership. Dogs and cats, in particular, are among the most popular choices for pets, with many households considering them as family members rather than mere animals.

With this shift in perception comes a greater willingness among pet owners to invest in advanced medical treatments for their beloved companions. This includes orthopedic care, which addresses a wide range of musculoskeletal conditions in animals, including fractures, ligament tears, joint instability, and osteoarthritis. The increasing demand for veterinary orthopedic solutions is driven by pet owners' desire to ensure the overall health and longevity of their pets. Many pet owners are proactive in seeking preventive measures and treatment options to address orthopedic issues, recognizing the

importance of early detection and intervention in maintaining their pets' mobility and quality of life.

Veterinarians play a crucial role in educating pet owners about the significance of orthopedic health and the available treatment options. They often recommend orthopedic evaluations for pets, particularly as they age or if they exhibit symptoms of musculoskeletal disorders. This proactive approach to pet healthcare further drives the demand for veterinary orthopedic products and services. Moreover, the increasing prevalence of orthopedic conditions in pets underscores the need for effective treatment modalities. Factors such as age, breed predisposition, obesity, and trauma contribute to the development of these conditions, necessitating specialized orthopedic care. The rising pet ownership trends have also led to the emergence of a robust market for pet insurance plans, which alleviate the financial burden associated with veterinary care. This, in turn, makes orthopedic treatments more accessible to a broader segment of pet owners, further fueling the growth of the veterinary orthopedics market.

Growing Awareness of Animal Health

The growing awareness of animal health is playing a pivotal role in boosting the global veterinary orthopedics market. Pet owners are increasingly recognizing the importance of maintaining optimal health and well-being for their animals, leading to a heightened demand for specialized veterinary orthopedic solutions. As pets become integral members of households worldwide, pet owners are becoming more proactive in addressing their companions' healthcare needs. This includes a greater emphasis on preventive measures and early intervention for orthopedic conditions, such as fractures, ligament tears, joint instability, and osteoarthritis.

Veterinarians are instrumental in driving awareness about the significance of orthopedic health among pet owners. Through regular check-ups and consultations, veterinarians educate pet owners about the importance of maintaining musculoskeletal health and identifying potential issues early on. This proactive approach to pet healthcare fosters a culture of preventive care, leading to an increased demand for veterinary orthopedic products and services.

Moreover, advancements in communication channels, such as social media and online forums, have facilitated the dissemination of information about animal health and veterinary care. Pet owners now have access to a wealth of resources and educational materials, empowering them to make informed decisions about their

pets' health.

The proliferation of pet-related media and literature has also contributed to the growing awareness of animal health. Television programs, documentaries, and books focusing on pet care often highlight the importance of orthopedic health and the available treatment options. This exposure raises pet owners' consciousness about the need for specialized orthopedic care for their animals. Additionally, pet owners are increasingly seeking out alternative and complementary therapies to address orthopedic conditions in their pets. This includes modalities such as acupuncture, physical therapy, and hydrotherapy, which can complement traditional veterinary orthopedic treatments. The growing acceptance and adoption of these alternative therapies further contribute to the expansion of the veterinary orthopedics market.

Technological Advancements in Veterinary Orthopedics

Technological advancements in veterinary orthopedics are revolutionizing the field and significantly boosting the global market. These innovations are enhancing treatment outcomes, improving surgical precision, and expanding the range of available options for addressing musculoskeletal conditions in animals. One of the most notable advancements is the integration of 3D printing technology in the production of customized orthopedic implants. This technology allows veterinarians to create implants tailored to the specific anatomical dimensions of individual patients, resulting in better fit and improved post-operative outcomes. Customized implants reduce the risk of complications such as implant migration or loosening, thereby enhancing patient mobility and comfort.

Minimally invasive surgical techniques are another key technological advancement driving growth in the veterinary orthopedics market. These techniques involve smaller incisions and less tissue disruption compared to traditional open surgeries, leading to faster recovery times and reduced post-operative pain for patients. Minimally invasive procedures are particularly beneficial for orthopedic surgeries, as they minimize trauma to surrounding tissues and joints, resulting in better long-term function and mobility for animals. The development of advanced orthopedic instrumentation is enhancing surgical precision and efficiency. High-quality surgical instruments, such as arthroscopes, power tools, and precision instruments, enable veterinarians to perform complex orthopedic procedures with greater accuracy and control. These instruments facilitate minimally invasive approaches and allow for more precise manipulation of tissues and implants, leading to improved surgical outcomes and reduced complication rates.

Digital health solutions are also making significant contributions to the advancement of veterinary orthopedics. Telemedicine platforms enable remote consultations and virtual follow-ups, allowing veterinarians to provide timely advice and support to pet owners before and after orthopedic procedures. Wearable devices, such as activity trackers and joint motion sensors, enable remote monitoring of patients' mobility and rehabilitation progress, facilitating personalized care and optimizing treatment outcomes.

Key Market Challenges

Regulatory Hurdles and Compliance Issues

One of the primary challenges hindering the global veterinary orthopedics market is navigating the complex regulatory landscape governing veterinary medical devices and procedures. Market players must comply with stringent regulatory requirements set forth by various regulatory agencies worldwide, including the U.S. Food and Drug Administration (FDA) and the European Medicines Agency (EMA). Obtaining regulatory approvals for new orthopedic products and procedures can be a time-consuming and costly process, delaying market entry and hindering innovation. Moreover, differing regulatory standards across regions can pose challenges for companies seeking to expand their market presence globally. Ensuring compliance with evolving regulatory requirements while maintaining product quality and safety standards remains a significant challenge for market players in the veterinary orthopedics space.

Economic Constraints and Affordability Issues

Another challenge facing the Global Veterinary Orthopedics Market is the limited accessibility to advanced veterinary care in certain regions, particularly in rural and underserved areas. Veterinary clinics equipped with specialized diagnostic tools and expertise in renal care may be concentrated in urban centers, leaving pet owners in remote areas with limited access to essential veterinary services.

The lack of accessibility to advanced veterinary care exacerbates disparities in healthcare access among pet owners, resulting in delayed diagnosis, inadequate treatment, and poor clinical outcomes for animals with renal disorders. Bridging the gap in accessibility to veterinary renal care requires strategic investments in veterinary infrastructure, telemedicine initiatives, and mobile veterinary services to extend the reach of specialized care to underserved communities.

Supply Chain Disruptions and Material Shortages

Supply chain disruptions and material shortages pose significant challenges for market players in the global veterinary orthopedics market. The reliance on a complex network of suppliers for raw materials, components, and finished products makes the industry vulnerable to disruptions caused by factors such as natural disasters, geopolitical tensions, and transportation bottlenecks. The COVID-19 pandemic highlighted the vulnerabilities of global supply chains, with disruptions leading to shortages of essential orthopedic materials and components. These disruptions can result in delays in production, increased costs, and challenges in meeting customer demand, ultimately impacting market growth. Market players must proactively manage supply chain risks by diversifying suppliers, implementing contingency plans, and investing in inventory management systems to mitigate the impact of disruptions and ensure continuity of operations.

Key Market Trends

Focus on Regenerative Medicine and Orthobiologics

Regenerative medicine and orthobiologics are emerging as transformative forces in the global veterinary orthopedics market, driving significant growth and innovation. These cutting-edge treatment modalities harness the body's natural healing processes to promote tissue repair and regeneration, offering promising alternatives to traditional surgical interventions and pharmaceuticals. As veterinarians and pet owners increasingly recognize the potential of regenerative medicine and orthobiologics in treating orthopedic conditions in animals, the market for these therapies is experiencing rapid expansion.

One of the key drivers behind the growing adoption of regenerative medicine and orthobiologics in veterinary orthopedics is their ability to address a wide range of musculoskeletal disorders effectively. Stem cell therapy, for example, utilizes the regenerative properties of stem cells to repair damaged tissues and promote healing in conditions such as osteoarthritis, ligament injuries, and cartilage defects. Platelet-rich plasma (PRP) therapy harnesses the healing properties of platelets to accelerate tissue repair and reduce inflammation, making it a valuable treatment option for soft tissue injuries and joint diseases.

Another factor contributing to the rise of regenerative medicine and orthobiologics in

veterinary orthopedics is their minimally invasive nature and favorable safety profile. Unlike traditional surgical procedures, which can be invasive and carry risks of complications and prolonged recovery times, regenerative medicine therapies often involve simple, minimally invasive procedures with minimal post-operative discomfort. This makes them particularly appealing for pet owners seeking less invasive treatment options for their animals, driving demand for these therapies in the veterinary orthopedics market.

The growing body of scientific evidence supporting the efficacy of regenerative medicine and orthobiologics in veterinary orthopedics is bolstering confidence among veterinarians and pet owners alike. Numerous studies have demonstrated the positive effects of these therapies in promoting tissue regeneration, reducing pain and inflammation, and improving overall joint function in animals. As awareness of these benefits continues to spread, the demand for regenerative medicine and orthobiologics in veterinary orthopedics is expected to soar, further fueling market growth.

Growth in Pet Insurance Adoption

The global veterinary orthopedics market is experiencing a significant boost due to the growing adoption of pet insurance worldwide. As pet ownership continues to rise and pet owners increasingly prioritize their companions' health and well-being, the uptake of pet insurance plans is becoming more prevalent. This trend is driving demand for specialized veterinary orthopedic care and treatments, thereby fueling market growth. Pet insurance provides pet owners with financial protection against unexpected veterinary expenses, including orthopedic procedures and treatments. By covering a portion of the costs associated with veterinary care, pet insurance plans alleviate the financial burden on pet owners, making specialized orthopedic treatments more accessible and affordable. As a result, pet owners are more likely to seek out advanced orthopedic care for their animals, leading to increased demand for veterinary orthopedic products and services.

Moreover, the availability of comprehensive pet insurance plans that cover orthopedic conditions is driving further growth in the veterinary orthopedics market. These plans typically include coverage for diagnostics, surgeries, medications, and rehabilitation services related to orthopedic ailments such as fractures, ligament tears, and osteoarthritis. Pet owners are increasingly recognizing the value of having insurance coverage for their pets' orthopedic health, prompting them to invest in insurance plans that offer comprehensive coverage for a wide range of conditions.

The COVID-19 pandemic has also contributed to the growth in pet insurance adoption, as pet owners seek to safeguard their animals' health in uncertain times. The pandemic has underscored the importance of being financially prepared for unexpected veterinary expenses, leading to an increased awareness of the benefits of pet insurance among pet owners. As a result, many pet owners are opting to enroll their pets in insurance plans to ensure they have access to quality veterinary care, including orthopedic treatments, when needed.

The expansion of the pet insurance market to include a wider range of coverage options and customizable plans is driving increased adoption among pet owners. Insurance providers are offering tailored plans that cater to the specific needs of pet owners, including coverage for orthopedic conditions and related treatments. This flexibility and customization are appealing to pet owners seeking comprehensive coverage for their pets' orthopedic health, further driving growth in the veterinary orthopedics market.

Segmental Insights

End Use Insights

Based on the end use, veterinary hospitals & clinics emerged as the dominant segment in the global veterinary orthopedics market in 2023. Veterinary hospitals and clinics serve as primary points of access for pet owners seeking orthopedic care for their animals. These facilities are equipped with specialized equipment, diagnostic tools, and trained veterinary professionals capable of diagnosing and treating a wide range of orthopedic conditions in animals. Furthermore, veterinary hospitals and clinics play a crucial role in educating pet owners about the importance of orthopedic health and preventive care measures.

Product Insights

Based on the product, implants segment emerged as the fastest growing segment in the global veterinary orthopedics market in 2023. Implants are essential components of many orthopedic procedures for animals, providing stability, support, and alignment to injured or diseased bones and joints. These implants, which include plates, screws, pins, and rods, are used in the treatment of fractures, ligament tears, joint instability, and other orthopedic conditions. As such, they represent a fundamental aspect of veterinary orthopedic care and are in high demand among veterinarians and

pet owners alike.

Regional Insights

North America emerged as the dominant region in the global veterinary orthopedics market in 2023, holding the largest market share. North America has a robust pet ownership culture, with a significant portion of households owning pets, particularly dogs and cats. This high pet ownership rate translates into a large and consistent demand for veterinary orthopedic products and services. The region is home to a well-established veterinary infrastructure, comprising advanced veterinary hospitals, clinics, and specialty practices specializing in orthopedic care. These facilities are equipped with state-of-the-art diagnostic tools and surgical equipment, enabling veterinarians to provide high-quality orthopedic treatments to their patients.

Key Market Players

Narang Medical Limited

B. Braun SE

Vimian Group AB

Integra LifeSciences Corporation

Medical Device Business Services, Inc.

AmerisourceBergen Corporation

Arthrex, Inc.

Orthomed (UK) Ltd

Veterinary Instrumentation Ltd

Report Scope:

In this report, the Global Veterinary Orthopedics Market has been segmented into the following categories, in addition to the industry trends which have

als%li%been detailed below:

Veterinary Orthopedics Market, By Application:

TPLO

TTA

Joint Replacement

Trauma

Other Applications

Veterinary Orthopedics Market, By Product:

Implants

Instruments

Veterinary Orthopedics Market, By Animal Type:

Canine

Feline

Other Animals

Veterinary Orthopedics Market, By End Use:

Veterinary Hospitals & Clinics

Others

Veterinary Orthopedics 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 Orthopedics Market.

Available Customizations:

Global Veterinary Orthopedics 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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