

# **Veterinary Prosthetics & Orthotics Market - Global Industry Size, Share, Trends, Opportunity and Forecast, Segmented By Product Type (Orthotics, Prosthetics), By Animal Type (Canine, Feline, Others), By Technique (Molding, 3D Printing), By Region and Competition, 2019-2029F**

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## **Abstracts**

Global Veterinary Prosthetics & Orthotics Market was valued at USD 36.54 million in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 8.01% through 2029. The global Veterinary Prosthetics & Orthotics Market has experienced remarkable growth in recent years, driven by advancements in veterinary medicine, increased pet ownership, and a growing awareness of animal welfare. This market, which encompasses prosthetic and orthotic devices designed specifically for animals, addresses the needs of pets and working animals alike, including dogs, cats, horses, and exotic species. The primary aim of veterinary prosthetics and orthotics is to enhance mobility, improve quality of life, and restore function to animals suffering from congenital defects, injuries, or amputations. Technological innovations such as 3D printing, advanced materials, and biomechanical engineering have revolutionized the design and production of these devices, allowing for customized solutions tailored to individual patient requirements. Rising investments in research and development have led to the introduction of cutting-edge products with improved durability, comfort, and performance. The market is also witnessing a surge in demand for minimally invasive procedures and non-surgical treatment options, further driving the adoption of prosthetic and orthotic solutions.

Increasing pet insurance coverage and reimbursement policies for veterinary care have encouraged pet owners to seek comprehensive treatment options, including prosthetic

and orthotic interventions. Geographically, North America and Europe dominate the global market, owing to a large pet population, well-established veterinary infrastructure, and high disposable income levels. However, emerging economies in Asia Pacific and Latin America are expected to present lucrative growth opportunities, fueled by rising pet ownership rates, expanding veterinary services, and improving healthcare infrastructure. Collaborations between veterinary clinics, academic institutions, and industry players are fostering innovation and knowledge exchange, driving market expansion and product development. Despite these positive trends, challenges such as high costs associated with advanced prosthetic devices, limited reimbursement policies, and regulatory constraints may impede market growth to some extent. Nonetheless, with an increasing focus on animal welfare and the continual advancement of veterinary medical technology, the global Veterinary Prosthetics & Orthotics Market is poised for sustained growth in the coming years, offering new hope and improved outcomes for countless animals worldwide.

## Key Market Drivers

### Advancements in Veterinary Medicine

Advancements in veterinary medicine have been instrumental in boosting the global Veterinary Prosthetics & Orthotics Market, driving innovation, and improving outcomes for animals in need of prosthetic and orthotic solutions. One of the key areas of advancement lies in surgical techniques, where veterinarians have made significant strides in developing minimally invasive procedures for implantation and attachment of prosthetic devices. These techniques reduce surgical trauma, accelerate recovery times, and improve overall patient outcomes, thus increasing the acceptance and adoption of prosthetic interventions among both veterinary professionals and pet owners.

Advancements in diagnostic imaging technologies have revolutionized the evaluation and treatment planning process for animals requiring prosthetic or orthotic interventions. High-resolution imaging modalities such as computed tomography (CT) and magnetic resonance imaging (MRI) provide detailed anatomical information, allowing veterinarians to accurately assess the extent of injuries or deformities and design customized prosthetic devices tailored to each patient's unique anatomy. This personalized approach enhances the fit, function, and comfort of prosthetics, leading to better mobility and quality of life for the animal recipients. In addition to surgical and diagnostic advancements, the use of advanced materials and manufacturing techniques has significantly improved the design and durability of prosthetic and orthotic devices for

animals. The advent of 3D printing technology, in particular, has revolutionized the production process by enabling the creation of highly customized prosthetics with intricate designs and precise dimensions. This allows for a better match between the prosthetic device and the animal's anatomy, minimizing discomfort and maximizing functionality. The use of lightweight yet durable materials such as carbon fiber and titanium ensure longevity and resilience, even in active or working animals.

Advancements in veterinary medicine have played a pivotal role in driving the growth of the global Veterinary Prosthetics & Orthotics Market by improving the efficacy, safety, and accessibility of prosthetic and orthotic solutions for animals. As technology continues to evolve and research efforts progress, the future of veterinary prosthetics and orthotics holds great promise, offering new hope and improved outcomes for animals in need of mobility assistance and rehabilitation.

### Rising Pet Ownership

Rising pet ownership is a significant factor contributing to the growth of the global Veterinary Prosthetics & Orthotics Market, as it drives the demand for comprehensive veterinary care and specialized medical interventions for pets in need. As more people welcome pets into their homes and families, there is an increased awareness and commitment to ensuring the health and well-being of these beloved companions, even in the face of mobility challenges or injuries. With a growing number of households owning pets, the demand for veterinary services has expanded, creating a larger market for prosthetic and orthotic solutions. Pet owners are increasingly willing to invest in advanced medical treatments to improve the quality of life for their furry friends, including prosthetic limbs, braces, or orthotic devices to address mobility issues resulting from congenital defects, injuries, or aging.

The emotional bond between pet owners and their animals plays a significant role in driving the demand for prosthetic and orthotic interventions. Pets are considered cherished members of the family, and pet owners are often willing to go to great lengths to ensure their pets' comfort and well-being, including seeking out specialized medical care and rehabilitation services. This emotional connection fosters a willingness to explore treatment options such as prosthetics or orthotics, even if they come at a higher cost.

The increasing availability of pet insurance and reimbursement policies has made it more financially feasible for pet owners to pursue advanced medical interventions for their animals, including prosthetic and orthotic solutions. As pet insurance coverage

expands and becomes more comprehensive, it alleviates some of the financial burdens associated with veterinary care, making it easier for pet owners to access specialized treatments and procedures for their pets. The rise of social media and online communities dedicated to pet care and advocacy has also contributed to the growing awareness and acceptance of prosthetic and orthotic interventions for animals. Pet owners share their experiences and success stories with prosthetic devices, creating a sense of community and support for others facing similar challenges with their pets' mobility.

### Technological Innovations

Technological innovations are playing a pivotal role in boosting the global Veterinary Prosthetics & Orthotics Market, driving advancements in design, manufacturing, and customization of prosthetic and orthotic devices for animals. These innovations are revolutionizing the field of veterinary medicine, offering new possibilities for improving mobility, comfort, and quality of life for animals in need. One of the key technological advancements driving the growth of the Veterinary Prosthetics & Orthotics Market is the adoption of 3D printing technology. 3D printing allows for the creation of highly customized prosthetic and orthotic devices tailored to the unique anatomy and needs of individual patients. Veterinary professionals can now design and produce prosthetics with intricate geometries and precise dimensions, ensuring a better fit and improved functionality for the animal recipients. 3D printing enables rapid prototyping and iteration, reducing both production time and costs associated with traditional manufacturing methods.

In addition to 3D printing, advancements in materials science are enhancing the durability, flexibility, and biocompatibility of prosthetic and orthotic materials. Lightweight yet strong materials such as carbon fiber, titanium, and advanced polymers are increasingly being used in the fabrication of prosthetic limbs and orthotic braces, offering improved performance and longevity compared to traditional materials. These advanced materials not only enhance the functionality of prosthetic devices but also contribute to greater comfort and mobility for the animals wearing them. The integration of biomechanical engineering principles into the design and development of prosthetic and orthotic devices is driving innovation in the field. By leveraging principles of biomechanics, engineers can optimize the design of prosthetic limbs and orthotic braces to mimic natural movement patterns and provide better support to the animal's musculoskeletal system. This results in prosthetic and orthotic solutions that are more comfortable, functional, and responsive to the animal's movements, ultimately improving their overall mobility and quality of life.

Advancements in digital imaging and diagnostic technologies are facilitating more accurate assessment and treatment planning for animals in need of prosthetic or orthotic interventions. High-resolution imaging modalities such as computed tomography (CT) and magnetic resonance imaging (MRI) provide detailed anatomical information, allowing veterinary professionals to precisely evaluate the extent of injuries or deformities and design customized prosthetic devices tailored to each patient's unique anatomy.

## Key Market Challenges

### High Cost of Prosthetic and Orthotic Devices

One of the significant challenges hindering the Global Veterinary Prosthetics & Orthotics Market is the high cost associated with prosthetic and orthotic devices. The development and manufacturing of these specialized devices often involves advanced technologies and materials, which can drive up production costs. The customization required to fit each device to the unique anatomy of individual animals further adds to the expense. As a result, the high cost of prosthetic and orthotic solutions can act as a barrier for pet owners, limiting the accessibility of these treatments for animals in need.

### Limited Reimbursement Policies

Another key challenge facing the Veterinary Prosthetics & Orthotics Market is the limited availability of reimbursement policies for prosthetic and orthotic treatments. Unlike human healthcare, where insurance coverage often includes prosthetic devices and rehabilitation services, pet insurance policies typically have limited coverage for veterinary care, including prosthetics and orthotics. This lack of reimbursement can deter pet owners from pursuing these specialized treatments, as they may be hesitant to bear the full financial burden themselves. Improving reimbursement policies for veterinary prosthetic and orthotic treatments could help alleviate this challenge and make these interventions more accessible to pet owners.

### Regulatory Constraints and Standards

Regulatory constraints and standards pose significant challenges for manufacturers and developers of veterinary prosthetic and orthotic devices. Unlike human medical devices, which are subject to stringent regulatory oversight and certification processes, the regulatory landscape for veterinary medical devices can be less clear and more

fragmented. This lack of uniformity in regulations can create barriers to market entry for manufacturers, leading to delays in product development and commercialization. Varying regulatory requirements across different regions and countries can further complicate the process of bringing veterinary prosthetic and orthotic devices to market, inhibiting market growth and innovation.

## Key Market Trends

### Increasing Awareness of Animal Welfare

The increasing awareness of animal welfare is a significant driver boosting the global Veterinary Prosthetics & Orthotics Market, as it fosters a greater emphasis on providing comprehensive care and support for animals in need of mobility assistance or rehabilitation. As society becomes more cognizant of the ethical and moral considerations surrounding animal welfare, there is a growing commitment to ensuring that animals receive the same level of care and compassion as humans, including access to advanced medical interventions such as prosthetic and orthotic solutions.

One of the keyways in which increasing awareness of animal welfare is driving the growth of the Veterinary Prosthetics & Orthotics Market is by fostering greater acceptance and adoption of prosthetic and orthotic interventions within the veterinary community and among pet owners. Veterinarians are increasingly recognizing the importance of addressing the medical needs of injured or disabled animals and are incorporating prosthetic and orthotic treatments into their practice to improve the quality of life for their patients. Pet owners who are passionate about animal welfare are more likely to seek out specialized medical care and rehabilitation services for their pets, including prosthetic or orthotic interventions, to ensure that their animals receive the support they need to live happy and fulfilling lives.

The increasing awareness of animal welfare issues has led to a greater willingness among pet owners to invest in advanced medical treatments for their animals, including prosthetic and orthotic solutions. Pet owners who are committed to providing the best possible care for their furry companions are more likely to explore all available treatment options, including prosthetic or orthotic interventions, to address mobility issues resulting from injuries, congenital defects, or aging. This heightened awareness and commitment to animal welfare creates a larger market for prosthetic and orthotic solutions, driving demand and innovation in the Veterinary Prosthetics & Orthotics Market.



The rise of animal advocacy groups and organizations dedicated to promoting animal welfare has played a significant role in raising awareness about the importance of providing comprehensive care and support for animals in need. These groups advocate for the rights and well-being of animals and work to educate the public about the various ways in which animals can benefit from prosthetic and orthotic interventions.

### Expanding Veterinary Services

Expanding veterinary services are playing a crucial role in boosting the global Veterinary Prosthetics & Orthotics Market, as they create a larger market for specialized medical interventions and foster greater accessibility to prosthetic and orthotic solutions for animals in need. As economies develop and disposable incomes rise, there is a corresponding increase in demand for comprehensive veterinary care, including advanced treatments such as prosthetic and orthotic interventions, among pet owners.

One of the keyways in which expanding veterinary services are driving the growth of the Veterinary Prosthetics & Orthotics Market is by increasing the availability and accessibility of specialized treatments for animals. Veterinary clinics and hospitals are expanding their service offerings to include a wider range of medical interventions, including prosthetic and orthotic solutions, to cater to the diverse needs of pet owners. This expansion of veterinary services creates opportunities for veterinary professionals to incorporate prosthetic and orthotic treatments into their practice and offer these services to a larger number of animal patients.

Collaborations between veterinary clinics, academic institutions, and industry stakeholders are driving innovation and knowledge exchange in the field of veterinary medicine, further propelling the growth of the Veterinary Prosthetics & Orthotics Market. By working together to develop new technologies, techniques, and treatment modalities, these collaborations facilitate advancements in prosthetic and orthotic solutions for animals, ultimately improving outcomes and expanding the scope of veterinary care.

The expansion of veterinary services in emerging markets presents lucrative growth opportunities for the Veterinary Prosthetics & Orthotics Market. As economies in regions such as Asia Pacific and Latin America continue to develop, there is a corresponding increase in pet ownership rates and demand for comprehensive veterinary care. Veterinary clinics and hospitals in these regions are expanding their infrastructure and investing in advanced medical equipment and technologies, creating a larger market for prosthetic and orthotic solutions.

The increasing prevalence of pet insurance and reimbursement policies is making it more financially feasible for pet owners to pursue advanced medical interventions for their animals, including prosthetic and orthotic treatments. As pet insurance coverage expands and becomes more comprehensive, it alleviates some of the financial burdens associated with veterinary care, making it easier for pet owners to access specialized treatments and procedures for their pets.

## Segmental Insights

### Animal Type Insights

Based on the animal type, canine segment emerged as the dominant segment in the global veterinary prosthetics & orthotics market in 2023. Dogs are one of the most common and popular pets worldwide, with a significant portion of households owning at least one canine companion. The large population of dogs translates to a higher demand for veterinary care, including prosthetic and orthotic interventions. Dogs are highly active animals that may be more prone to injuries or mobility issues, whether due to congenital defects, accidents, or aging-related conditions. As a result, there is a greater need for prosthetic and orthotic solutions to help improve the mobility and quality of life for dogs facing such challenges.

Advancements in veterinary medicine and technology have led to the development of specialized prosthetic and orthotic devices tailored specifically for dogs. These devices are designed to accommodate the unique anatomical features and movement patterns of dogs, ensuring a better fit and improved functionality compared to generic solutions.

### Product Type Insights

Based on the product type, prosthetics segment emerged as the dominant segment in the global veterinary prosthetics & orthotics market in 2023. Prosthetic devices play a crucial role in restoring mobility and function to animals that have lost limbs due to congenital defects, accidents, or medical conditions. Prosthetics provide animals with the ability to walk, run, and engage in normal activities, thereby significantly improving their quality of life. As a result, there is a high demand for prosthetic solutions among veterinarians and pet owners seeking to address mobility issues in their animal patients. Advancements in prosthetic technology have led to the development of highly advanced and customizable prosthetic devices tailored specifically for animals. These devices utilize cutting-edge materials and manufacturing techniques, such as 3D printing, to create lightweight, durable, and comfortable prosthetics that closely mimic the natural



movement and anatomy of the animal. This level of customization and innovation has significantly enhanced the effectiveness and acceptance of prosthetic solutions in the veterinary field.

## Regional Insights

North America emerged as the dominant region in the global veterinary prosthetics & orthotics market in 2023, holding the largest market share. North America boasts a large and well-established pet population, with millions of households owning pets ranging from dogs and cats to horses and exotic animals. This high pet ownership rate creates a robust demand for veterinary services, including prosthetic and orthotic interventions, as pet owners seek to ensure the health and well-being of their beloved companions. Favorable government initiatives, policies, and regulations in North America support the growth of the veterinary prosthetics and orthotics industry. These regulations ensure safety, quality, and efficacy standards for prosthetic and orthotic devices, providing confidence to veterinary professionals and pet owners alike.

## Key Market Players

Dassiet Vet, Inc

Animal Ortho Care

Walkin' Pets

My Pet's Brace

Movora

K-9 Orthotics & Prosthetics Inc.

Medical Device Business Services, Inc.

Petsthetics, LLC.

Doggon' Wheels, LLC

Best Friend Mobility

## Report Scope:

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

### Veterinary Prosthetics & Orthotics Market, By Product Type:

Orthotics

Prosthetics

### Veterinary Prosthetics & Orthotics Market, By Animal Type:

Canine

Feline

Others

### Veterinary Prosthetics & Orthotics Market, By Technique:

Molding

3D Printing

### Veterinary Prosthetics & Orthotics 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 Prosthetics & Orthotics Market.

## Available Customizations:

Global Veterinary Prosthetics & Orthotics 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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