

# **Veterinary Video Endoscopy Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented by Solution (Equipment, Accessories/ Consumables, PACS), by Animal Type (Small Animals, Large Animals), by Application (Diagnostic, Surgical/ interventional), by Procedure (Respiratory Endoscopy, Abdominal/ GI tract Endoscopy, Urogenital Endoscopy, ENT Endoscopy, others), by End User (Veterinary Clinics & Hospitals, others), and By Region, Competition**

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## **Abstracts**

The Global Veterinary Video Endoscopy Market recorded a valuation of USD 192.35 Million in 2022, and it is poised for impressive growth in the forecast period, with an anticipated Compound Annual Growth Rate (CAGR) of 6.48% and expected to reach USD 279.35 Million through 2028. Veterinary video endoscopy is a medical procedure that employs flexible or rigid endoscopes equipped with cameras to visually inspect the internal structures of animals for diagnostic and therapeutic purposes. This minimally invasive technique enables veterinarians to visualize internal areas within the body without resorting to traditional open surgery. Veterinary video endoscopy serves both diagnostic and therapeutic purposes, including foreign body removal, tissue biopsies, minimally invasive surgeries, and stent placement. This technology allows veterinarians to access organs, tissues, and structures that would otherwise be challenging to reach without open surgery. Consequently, it facilitates faster recovery times and reduces patient discomfort. Common applications include the diagnosis and treatment of gastrointestinal issues such as ulcers, polyps, and bleeding.

## Key Market Drivers

1. **Technological Advancements:** Technological advancements have been pivotal in shaping the field of veterinary video endoscopy, enabling veterinarians to provide more accurate diagnoses, perform minimally invasive procedures, and enhance patient care. Enhanced imaging technologies, including high-definition (HD) and ultra-high-definition (4K) cameras, have improved the visualization of internal structures, enabling precise identification of subtle abnormalities. Miniaturization techniques and advances in microelectronics have resulted in smaller and more flexible endoscopic devices capable of accessing smaller body cavities, accommodating animals of various sizes. Articulating endoscopes offer improved navigation through complex anatomical structures, enhancing maneuverability and visualization. Wireless endoscopy systems eliminate cumbersome cables, providing greater mobility and flexibility. Portable systems enable endoscopy in various clinical settings. Three-dimensional imaging technology offers depth perception and spatial orientation, aiding in more accurate and precise procedures. Adjustable LED lighting settings enhance visualization and minimize tissue damage. Image enhancement technologies, such as image stabilization and noise reduction, enhance image clarity. Integration with digital systems enables real-time recording, documentation, and sharing of endoscopic procedures. Robotic systems assist veterinarians in delicate and precise procedures. Capsule endoscopy involves small, ingestible capsules with tiny cameras for non-invasive exploration of the entire gastrointestinal system. Telemedicine platforms enable real-time consultation and guidance from specialists. Advanced software algorithms and artificial intelligence (AI) are integrated into endoscopy systems to assist with image analysis and pattern recognition, aiding in quicker and more accurate diagnoses.

2. **Growing Awareness and Adoption of Pet Care:** Increasing awareness and adoption of pet care practices reflect a societal shift where pets are regarded as integral family members. This shift has led to enhanced pet well-being, health, and overall quality of life. Pet owners are proactive in maintaining their pets' health through regular veterinary visits, vaccinations, preventive medications, and proper nutrition. Specialized diets tailored to individual needs have gained popularity. Natural and holistic approaches, including acupuncture, herbal remedies, and chiropractic care, are explored. Preventive measures such as regular check-ups, vaccinations, parasite control, dental care, and early disease detection are prioritized. Physical activity and mental stimulation are considered essential for pets' well-being. The pet care industry has expanded to include complementary services such as grooming, pet spas, pet hotels, doggy daycares, and pet training. Adoption of pet insurance is increasing. Pet-related content on social media

platforms influences responsible pet care practices. Access to information through books, online resources, seminars, and workshops aids informed decisions about pet care. Unique needs of elderly and special needs pets are recognized, leading to specialized care and adaptations. This trend contributes to increased demand for veterinary video endoscopy.

3. **Increased Focus on Animal Welfare:** The heightened focus on animal welfare reflects a growing awareness and commitment to ensuring the well-being, humane treatment, and ethical considerations for animals. Animal welfare laws and regulations have been enacted to protect animals from cruelty and ensure their basic needs are met. Ethical considerations emphasize minimizing suffering and treating animals with respect. Efforts to develop alternative methods for testing products and cosmetics without using animals aim to reduce the number of animals used in research and testing. Education promotes humane practices and responsible pet ownership. Humane farming practices prioritize animal well-being. Conservation efforts aim to protect endangered species and their habitats. Responsible pet ownership includes providing proper nutrition, veterinary care, housing, and mental and physical stimulation. Concerns about the welfare of animals used in entertainment have led to calls for more humane treatment and alternatives. Responsible wildlife tourism respects animals' natural behaviors and habitats. This heightened focus on animal welfare influences the demand for veterinary video endoscopy, which offers non-invasive diagnostic and treatment options that align with humane practices.

### Key Market Challenges

1. **Cost of Equipment and Training:** Veterinary video endoscopy equipment can be expensive to purchase and maintain. The initial investment may deter veterinary practices, particularly those with lower patient volumes that struggle to justify the cost. Ongoing maintenance and servicing expenses, including calibration, repairs, and software updates, add to the total cost of ownership. Specialized training is required for veterinary professionals and their staff to perform endoscopic procedures effectively. Smaller veterinary practices with limited resources and staff availability may face challenges in investing in expensive equipment and training. Concerns about return on investment (ROI) and the potential for equipment to become outdated due to technological advancements can impact adoption. Geographic access to training opportunities may vary, posing challenges for veterinarians in remote or rural areas.

2. **Animal Size and Variation:** Veterinary practices treat a wide range of animal species, each with unique anatomy and physiology. Variations exist not only between species

but also within the same species. Instruments designed for larger animals may not be suitable for smaller species, necessitating the development of miniaturized equipment. Unique anatomical features of certain species can pose challenges. Veterinarians require specialized training to adapt their techniques to different species and must continually update their knowledge of comparative anatomy. Some procedures, such as biopsies or surgeries, may be more complex in certain species due to their unique anatomy.

### Key Market Trends (Continued)

4. **Global Market Expansion:** The demand for veterinary video endoscopy equipment and services has expanded to various regions worldwide. Pet ownership is increasing, leading to a growing interest in advanced veterinary care. Emerging markets in regions like Asia-Pacific and Latin America are experiencing rising demand due to higher disposable income and changing attitudes toward pets. International veterinary associations and organizations contribute to knowledge dissemination through conferences, workshops, and collaborative efforts. Manufacturers and suppliers are expanding their reach to international markets, making their products and services available to a broader customer base.

### Segmental Insights

1. **Solution Insights:** In 2022, the Equipment segment dominated the Global Veterinary Video Endoscopy Market and is expected to continue its growth. The acceptance of video endoscopy as a non-invasive alternative to surgery in the veterinary field supports the development of this segment. Video endoscopy procedures are used for gastric and gastrointestinal examinations, biopsies, abdominal emptying, feeding tube placement, and upper airway examinations.

2. **Animal Type Insights:** In 2022, the small animal segment dominated the market and is expected to maintain its growth. Increased pet ownership, improved veterinary medicine and diagnostics, and the development of advanced video endoscopes contribute to the segment's expansion.

3. **Application Insights:** In 2022, the diagnostic segment dominated the market and is expected to continue expanding. Veterinary video endoscopy is used in a wide

range of operations, including biopsy sample collection, clinical sample collection, and assessment of weight loss, chronic nausea, and digestive issues. The

surgical/interventional segment is expected to grow significantly due to the increasing popularity of minimally invasive procedures in animals.

4. Procedure Insights: In 2022, the Abdominal/GI tract segment dominated the market and is anticipated to continue growing. Increased interventions and diagnostics to maintain the health of both small and large pets contribute to the segment's expansion. Digestive issues, in particular, have driven the demand for diagnostic endoscopy procedures.

5. End User Insights: In 2022, veterinary clinics and hospitals dominated the market and are expected to continue their growth. The rise in the number of patients treated in hospitals and clinics, along with the development of veterinary healthcare facilities, contributes to this trend.

### Regional Insights

1. North America: North America leads the Global Veterinary Video Endoscopy Market, accounting for over 34.5% of the market in 2022. The region's prominence is attributed to the increasing incidence of zoonotic diseases, pet domestication, and the proliferation of pet insurance policies. The Veterinary Endoscopy Society (VES) in the United States has played a significant role in advancing veterinary endoscopy.

### Key Market Players

Steris Corp

MDS Incorporated

Firefly Global

KARL STORZ SE & Co. KG

Advanced Monitors Corporation

Dr. Fritz Endoscopes GmbH

Biovision Veterinary Endoscopy, LLC

Eickemeyer

Ambu Inc.

Olympus Corporation

### Report Scope:

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

#### Veterinary Video Endoscopy Market, By Solution:

Equipment

Accessories/ Consumables

PACS

#### Veterinary Video Endoscopy Market, By Animal Type:

Small Animals

Large Animals

#### Veterinary Video Endoscopy Market, By Application:

Diagnostic

Surgical/ interventional

#### Veterinary Video Endoscopy Market, By Procedure:

Respiratory Endoscopy

Abdominal/ GI tract Endoscopy

Urogenital Endoscopy

ENT Endoscopy

others

Veterinary Video Endoscopy Market, By End User:

Veterinary Clinics & Hospitals

others

Global Veterinary Video Endoscopy Market, By region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

South Korea

Australia

Japan

Europe

Germany

France

United Kingdom

Spain

Italy

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

## Competitive Landscape

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

## Available Customizations:

Global Veterinary Video Endoscopy Market report with the given market data, Tech Sci 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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