

Veterinary X-ray Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028

Segmented By Animal Type (Small Animals, Large Animals), By Solutions (Equipment, Accessories/ Consumables, PACS), By Technology (Direct (Capture) Radiography, Computed Radiography, Film-based Radiography), By Portability (Fixed, Mobile), By Type (Digital, Analog), By Application (Orthopedics and Trauma, Respiratory, Gastrointestinal, Dentistry, Others), By End-Use (Veterinary Clinics & Hospitals, Others), By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

Global Veterinary X-ray Market has valued at USD 614.78 million in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.01% through 2028. The global veterinary X-ray market refers to the industry that produces and sells X-ray imaging equipment and related services specifically designed for veterinary applications. Veterinary X-ray technology is crucial for diagnosing various medical conditions in animals, including pets, livestock, and wildlife.

Key Market Drivers

Growing Pet Ownership

Pet ownership is on the rise worldwide, and this surge in the number of furry and feathered companions is not only transforming households but also fueling significant changes in the veterinary healthcare industry. As more people open their hearts and homes to pets, the demand for high-quality veterinary care has never been greater. One of the pivotal elements of modern veterinary care is diagnostic imaging, with X-ray technology playing a vital role. The primary catalyst behind the growth of the global veterinary X-ray market is the surge in pet ownership. With more people adopting pets, the need for comprehensive veterinary services has skyrocketed. Pet owners are increasingly seeking preventative and curative healthcare solutions for their animal companions. This trend has significantly boosted the demand for diagnostic tools like X-ray machines in veterinary practices. Today's pet owners are more informed and proactive about their pets' health than ever before. They recognize the importance of regular check-ups and early disease detection. Diagnostic imaging, including X-rays, has become a fundamental part of ensuring pets' well-being. As pet owners become more educated about healthcare options for their furry friends, they are more likely to request and consent to X-ray examinations when recommended by veterinarians. X-ray technology in veterinary care is not limited to a specific type of ailment or condition. It can be used to diagnose a broad spectrum of issues, including bone fractures, joint abnormalities, dental problems, organ diseases, tumors, and gastrointestinal blockages. As veterinarians have access to more comprehensive diagnostic tools, they can provide more accurate diagnoses and develop tailored treatment plans. This not only improves pet healthcare but also strengthens pet owners' trust in veterinary services. The growth in pet ownership has led to an increase in the number of veterinary hospitals, clinics, and specialty centers. These facilities are equipped with advanced medical equipment, including X-ray machines, to provide the best possible care for pets. The expansion of veterinary infrastructure further fuels the demand for veterinary X-ray technology. The veterinary X-ray market has seen significant advancements in technology. Digital radiography (DR) and computed tomography (CT) have become prevalent, offering veterinarians improved image quality, faster results, and lower radiation exposure. These technological innovations make X-ray examinations more appealing to both veterinarians and pet owners. The growing demand for veterinary X-ray equipment presents substantial investment opportunities for companies specializing in medical imaging technology. Market players are keen to invest in research and development to create cutting-edge solutions tailored to the specific needs of veterinary care.

Advancements in Veterinary Medicine

Advancements in veterinary medicine have been transforming the way we care for our animal companions. Modern veterinary practices are now equipped with state-of-the-art

technologies that mirror the innovations seen in human healthcare. One such critical component of this transformation is diagnostic imaging, with X-ray technology at the forefront. One of the primary ways advancements in veterinary medicine contribute to the growth of the veterinary X-ray market is through improved diagnostic accuracy. The development of cutting-edge diagnostic tools, such as digital radiography (DR) and computed tomography (CT) specifically designed for veterinary use, allows veterinarians to obtain highly detailed and accurate images. These advanced systems offer better visibility of anatomical structures, enabling veterinarians to identify and diagnose complex conditions more precisely. Early detection of diseases and medical conditions is crucial in both human and veterinary medicine. Advancements in veterinary medicine have highlighted the importance of early intervention in treating animals. Veterinary X-ray technology is a critical tool in this regard. By offering early detection capabilities, it enables veterinarians to diagnose and treat conditions at an earlier stage, often resulting in more effective treatments and improved outcomes for pets. Veterinary X-ray technology is no longer limited to traditional X-ray examinations. It now encompasses a broader range of applications, including dental radiography, musculoskeletal imaging, and even specialized procedures like fluoroscopy. These expanded applications have made veterinary X-ray equipment versatile and indispensable in diagnosing various medical conditions in animals, further driving its demand. As veterinary medicine advances, there is a growing demand for specialized diagnostic equipment tailored to the unique needs of veterinary care. Leading manufacturers in the veterinary X-ray market are now developing equipment with features specifically designed for animals of different sizes and species. These customized solutions enhance the overall efficiency of diagnostic procedures and contribute to the market's growth. Advancements in veterinary medicine are not just about better diagnoses and treatments; they are also about improving the welfare of animals. With the help of advanced imaging technologies like X-ray, veterinarians can identify and address conditions that might cause pain or discomfort in animals. This leads to a higher standard of care and increased demand for sophisticated diagnostic equipment. The growth of the veterinary X-ray market is also driven by substantial investments in research and development by companies specializing in medical imaging technology. These investments lead to the creation of innovative solutions that cater specifically to the evolving needs of veterinary medicine. As a result, veterinarians can access state-of-the-art equipment to deliver the best possible care to animals.

Specialized Veterinary Imaging Solutions

The global veterinary X-ray market is experiencing remarkable growth, thanks in no small part to the emergence and adoption of specialized veterinary imaging solutions.

These tailored innovations are revolutionizing the field of veterinary diagnostics, offering veterinarians enhanced capabilities to diagnose and treat a wide range of medical conditions in animals. Specialized veterinary imaging solutions are designed to cater specifically to the unique anatomical and diagnostic requirements of animals. Unlike human X-ray equipment, these systems are optimized to accommodate the varied sizes, species, and anatomical differences found in the animal kingdom. This level of customization ensures that veterinarians can obtain the highest quality diagnostic images, leading to precise diagnoses and effective treatment plans. Veterinary practices, whether small clinics or large hospitals, benefit significantly from specialized imaging solutions that streamline workflow. These systems often include features such as automated positioning and intuitive user interfaces tailored to veterinary professionals. As a result, veterinarians and their staff can efficiently conduct examinations, reducing patient stress and optimizing their overall practice operations. Specialized veterinary imaging solutions go beyond traditional X-rays. They encompass a wide range of imaging modalities, including digital radiography (DR), computed tomography (CT), fluoroscopy, and ultrasound. This expanded array of diagnostic tools allows veterinarians to investigate a broader spectrum of medical conditions, from musculoskeletal issues to internal organ abnormalities. Consequently, these advanced systems enhance the overall diagnostic capabilities of veterinary practices. Dental care is a critical aspect of veterinary medicine, particularly for companion animals. Specialized veterinary dental imaging solutions have evolved to provide high-resolution dental X-rays, making it easier to detect dental diseases, fractures, and other oral health issues. The availability of such equipment has improved the standard of dental care in veterinary practices and bolstered demand for veterinary X-ray technology. Veterinary imaging solutions are not limited to domestic pets but also cater to exotic and zoo animals. These specialized systems can accommodate a wide range of species, from small birds to large mammals. The ability to conduct non-invasive diagnostic procedures on exotic animals is vital for their well-being and is a driving force behind the growth of the veterinary X-ray market. Specialized veterinary imaging solutions are designed with a focus on safety and regulatory compliance. Ensuring the well-being of both animals and operators is paramount. By adhering to strict safety standards and guidelines, these systems instill confidence in veterinarians and pet owners alike, contributing to their widespread adoption.

Veterinary Hospital and Clinic Expansion

The global veterinary X-ray market is experiencing significant growth, driven by the expansion of veterinary hospitals and clinics worldwide. As the demand for advanced healthcare for pets and animals continues to rise, the need for cutting-edge diagnostic

tools such as X-ray machines tailored for veterinary use has never been greater. The expansion of veterinary hospitals and clinics is, first and foremost, a response to the increasing demand for comprehensive veterinary services. With more people welcoming pets into their homes, the need for professional veterinary care has surged. Veterinary practices are expanding their infrastructure to accommodate more patients and provide a wider range of medical services, including advanced diagnostics facilitated by X-ray technology. Veterinary practices that expand often invest in state-of-the-art medical equipment, including X-ray machines. These facilities aim to offer the highest quality of care to their animal patients, which includes accurate and timely diagnoses. As a result, they turn to advanced imaging solutions to enhance their diagnostic capabilities, driving the demand for veterinary X-ray equipment. Veterinary hospitals and clinics cater to a diverse range of animal species, from small companion animals to large livestock and exotic creatures. To serve these varied patients effectively, they require versatile diagnostic imaging equipment. Modern veterinary X-ray machines are designed to accommodate different animal sizes and types, making them an essential tool in the diagnostic arsenal of expanding veterinary practices. The expansion of veterinary facilities has led to the emergence of specialized care centers, such as oncology centers, orthopedic clinics, and dental practices for animals. These centers demand sophisticated diagnostic tools like digital radiography (DR) and computed tomography (CT) systems to provide specialized services. The growth of these specialized care centers significantly contributes to the demand for advanced X-ray technology. As veterinary hospitals and clinics incorporate advanced X-ray technology, they can achieve higher levels of diagnostic precision. Accurate and timely diagnoses are crucial for effective treatment planning and improved patient outcomes. This, in turn, enhances the reputation of these facilities, attracting more pet owners and further propelling the growth of the veterinary X-ray market. In today's competitive veterinary healthcare landscape, having state-of-the-art diagnostic capabilities is a distinct advantage. Expanding veterinary practices understands the importance of staying at the forefront of veterinary medicine to attract and retain clients. Equipping their facilities with advanced X-ray equipment is a strategic move to enhance their competitiveness and expand their client base.

Key Market Challenges

High Equipment Costs

One of the foremost challenges in the veterinary X-ray market is the high cost associated with purchasing and maintaining X-ray equipment. The initial investment in digital radiography (DR) or computed tomography (CT) systems can be substantial,

particularly for smaller veterinary practices. This cost can deter some clinics from adopting advanced X-ray technology, limiting its accessibility.

Limited Adoption in Emerging Markets

In emerging markets, where pet ownership is on the rise, the adoption of advanced veterinary X-ray technology may lag due to budget constraints and limited awareness of the benefits. Expanding the market in these regions requires overcoming economic challenges and educating veterinarians and pet owners about the value of advanced diagnostic tools.

Maintenance and Repairs

X-ray equipment, like any technology, requires regular maintenance and occasional repairs. The availability of qualified technicians and the cost of servicing can be challenges for veterinary practices, especially those in remote areas.

Competition from Alternative Diagnostic Methods

While X-ray technology is highly valuable, it faces competition from alternative diagnostic methods such as ultrasound, MRI, and endoscopy. Depending on the specific diagnostic needs and financial constraints, veterinarians may opt for alternative imaging techniques over X-rays.

Key Market Trends

Digital Radiography (DR) Dominance

Digital radiography (DR) has been steadily replacing traditional film-based X-ray systems in veterinary practices. The trend towards DR is expected to continue and accelerate. These systems offer superior image quality, immediate results, and enhanced diagnostic capabilities, making them the preferred choice for many veterinarians.

Portable and Mobile X-ray Units

The demand for portable and mobile X-ray units is on the rise. These compact and lightweight systems provide flexibility in veterinary practice settings, allowing for on-site imaging, especially in fieldwork or for patients who are challenging themselves to move.

The portability trend is expected to persist, driven by the need for convenience and versatility.

Specialized Veterinary Imaging Solutions

As the demand for precision and specialized care grows, manufacturers are developing imaging solutions tailored to specific veterinary applications. This includes equipment optimized for dental radiography, orthopedics, equine care, and exotic animals. Customized solutions cater to the diverse needs of veterinary professionals.

Eco-friendly and Low-dose X-ray Systems

Environmental concerns and the desire to minimize radiation exposure have led to the development of eco-friendly and low-dose X-ray systems. These systems reduce radiation emissions, benefiting both animals and veterinary staff. As sustainability becomes a greater focus, the demand for such systems is expected to increase.

Segmental Insights

Animal Type Insights

Based on the category of Animal Type, the category of small animals led the way in the worldwide veterinary x-ray market in 2022. Furthermore, it is projected that the small animal category will experience the most rapid expansion in the upcoming years. Several factors are driving this segment's growth, including an increasing population of companion animals, a rise in spending on pet care, a greater adoption of pet insurance, and advancements in imaging technologies designed specifically for small animals.

Solutions Insights

In 2022, within the solutions category, equipment secured the largest market share. This can be attributed to the increasing demand for X-ray equipment. As X-ray imaging equipment serves as a fundamental tool, its adoption is anticipated to increase in the foreseeable future. Moreover, these devices assist veterinarians in detecting bone diseases and fractures in animals, thanks to their heightened sensitivity and cost-effectiveness. Consequently, there is an expected surge in demand for equipment during the forecast period.

On the other hand, the PACS (Picture Archiving and Communication System) segment

is projected to experience the most rapid growth in the forecast period. This is primarily because PACS offers several advantages in veterinary radiography, such as more efficient access, storage, and sharing of images, resulting in both direct and cascading benefits.

Portability Insights

In 2022, the fixed category asserted its dominance in the global market in terms of portability, primarily because veterinarians extensively utilize this type of equipment. However, it is projected that the Mobile segment will exhibit the most substantial CAGR in the upcoming years. This growth can be attributed to the widespread adoption of these devices among veterinarians.

The popularity of mobile units is driven by their advantageous features, including user-friendliness, lightweight design, and seamless integration with digital equipment. These radiography units are particularly beneficial for patients who cannot easily visit radiology facilities.

Regional Insights

In 2022, the North American region secured the largest market revenue share, driven by factors such as the rising rate of pet ownership, strategic initiatives undertaken by key manufacturers, and the increasing prevalence of diseases in animals. According to the 2021 statistics from the North American Pet Health Insurance Association (NAPHIA), the U.S. witnessed a significant growth in the number of pets covered by insurance, reaching 3.1 million by 2020. This uptick indicates a corresponding increase in the use of x-ray equipment for pets in healthcare facilities, highlighting the growing demand for such equipment in the U.S.

Conversely, the Asia Pacific region is expected to experience the highest AGR during the forecast period. This growth can be attributed to several factors, including increased investment in research and development, the humanization of pets, a surge in animal healthcare expenditure, and the availability of cost-effective animal health products. Furthermore, global companies are increasing their investments in this region to expand their market presence, and there is a rising demand for veterinary imaging products, which is expected to drive market growth.

Key Market Players

IDEXX Laboratories, Inc.

Heska Corp

Sound Technologies Inc

FUJIFILM Holdings Corporation

Carestream Health Inc

Shenzhen Mindray Bio-Medical Electronics Co Ltd

Midmark Corp

Canon Medical Systems Corp

AGFA-Gevaert NV

Sedecal Control SA

Report Scope:

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

Veterinary X-ray Market, By Animal Type:

Small Animals

Large Animals

Veterinary X-ray Market, By Solutions:

Equipment

Accessories/ Consumables

PACS

Veterinary X-ray Market, By Technology:

Direct (Capture) Radiography

Computed Radiography

Film-based Radiography

Veterinary X-ray Market, By Portability:

Fixed

Mobile

Veterinary X-ray Market, By Type:

Digital

Analog

Veterinary X-ray Market, By Application:

Orthopedics and Trauma

Respiratory

Gastrointestinal

Dentistry

Others

Veterinary X-ray Market, By End-Use:

Veterinary Clinics & Hospitals

Others

Veterinary X-ray Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Veterinary X-ray Market.

Available Customizations:

Global Veterinary X-ray 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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