

Veterinary AI Diagnostics Market Size, Share and Growth Outlook 2026: By Offering Type, By Modality, By Animal Type, By Application, By End User, Companies to 2034

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Abstracts

The global Veterinary AI Diagnostics Market size is forecast to increase from \$812.84 Million in 2026 to \$2733.59 Million in 2034 at a CAGR of 16.37% between 2026 and 2034.

The Veterinary AI Diagnostics market report provides detailed analysis and outlook of Veterinary AI Diagnostics segments including By Offering Type (Software and Integrated Platforms, AI-Powered Diagnostic Devices and Hardware, Services), By Modality (AI Radiography / Medical Imaging, AI Hematology and Pathology Systems, AI Genomic and Molecular Testing), By Animal Type (Companion Animals, Livestock and Food-producing Animals), By Application (Infectious Disease Detection, Oncology and Tumor Assessment, Cardiology and Musculoskeletal Identification, Other Clinical Conditions), By End User (Veterinary Clinics and Reference Laboratories, Veterinary Hospitals, Research Centers and Academic Frameworks) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Veterinary AI Diagnostics Industry Overview

Artificial intelligence is transforming diagnostic accuracy and workflow efficiency in veterinary medicine.

The global veterinary AI diagnostics industry is expanding rapidly as veterinary practices adopt artificial intelligence to improve diagnostic speed, clinical consistency,

and decision-making across pathology, radiology, cytology, and laboratory medicine. Growing demand for faster point-of-care diagnostics, increasing companion animal healthcare expenditure, and shortages of veterinary specialists are encouraging wider deployment of machine learning-based clinical support tools. Manufacturers are integrating deep learning algorithms into imaging systems, digital pathology platforms, and cloud-connected diagnostic ecosystems that enable rapid interpretation while maintaining clinical oversight. These developments are positioning artificial intelligence as a valuable decision-support technology that complements veterinary expertise rather than replacing clinical judgment.

Point-of-care artificial intelligence is improving diagnostic speed and clinical decision support.

Manufacturers are introducing AI-powered diagnostic platforms capable of delivering rapid in-clinic analysis for common veterinary conditions. Zoetis strengthened this trend by integrating AI Masses into its Vetscan Imagyst® platform, enabling veterinary professionals to rapidly evaluate lymph node and subcutaneous masses in cats and dogs using deep learning algorithms trained on extensive cytology datasets. The system differentiates conditions including large-cell lymphoma, mast cell tumors, lipomas, and reactive hyperplasias within minutes, supporting immediate clinical triage. SignalPET further expanded practical AI adoption through integration of its machine-learning radiology software into leading cloud-based Practice Information Management Systems, combining automated interpretation of canine thoracic and abdominal radiographs with an intelligent escalation pathway that automatically refers uncertain cases to board-certified veterinary radiologists for expert review.

Education and clinical governance are supporting responsible AI implementation.

The industry is increasingly recognizing that successful adoption of artificial intelligence requires structured clinician education alongside technological innovation. Academic leaders have introduced the first formal artificial intelligence literacy curriculum for Doctor of Veterinary Medicine programs, focusing on practical understanding of convolutional neural networks, algorithm validation, interpretation of automated pathology and radiology outputs, and identification of potential model errors or hallucinations. This educational framework reflects the broader industry commitment to responsible AI deployment by ensuring veterinarians can effectively interpret automated analyses while maintaining clinical accountability. As AI adoption continues to expand across diagnostic disciplines, investment in education, validation standards, and human oversight is strengthening confidence in artificial intelligence as an integral component

of modern veterinary diagnostics.

Veterinary AI Diagnostics Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Veterinary AI Diagnostics market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Zoetis Inc., IDEXX Laboratories, Inc., Mars, Incorporated, SignalPET, Vetology LLC, VetCT, Imprimed, Inc., Scribenote Inc., Digitail, OneCup AI. The Veterinary AI Diagnostics market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Veterinary AI Diagnostics industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Veterinary AI Diagnostics Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Veterinary AI Diagnostics companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional Veterinary AI Diagnostics markets

- Competitive analysis including business description, product analysis, and financial profiles

- Key country specific analysis detailing key factors shaping the short-term and long-term outlook

- Recent industry developments and news including mergers, acquisitions,

product launches, expansions, and company announcements

Veterinary AI Diagnostics Market Competitive Benchmarking and Company Analysis

Leading companies in Veterinary AI Diagnostics industry include- Zoetis Inc., IDEXX Laboratories, Inc., Mars, Incorporated, SignalPET, Vetology LLC, VetCT, ImpriMed, Inc., Scribenote Inc., Digitail, OneCup AI. The Veterinary AI Diagnostics market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Veterinary AI Diagnostics Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Veterinary AI Diagnostics market remains one of the strongest-performing segments in the country.

The US Veterinary AI Diagnostics Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Veterinary AI Diagnostics market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Veterinary AI Diagnostics industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of

Canadian Veterinary AI Diagnostics markets

Canada's strong Veterinary AI Diagnostics sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Veterinary AI Diagnostics market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Veterinary AI Diagnostics Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Veterinary AI Diagnostics market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Veterinary AI Diagnostics population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Veterinary AI Diagnostics industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Veterinary AI Diagnostics market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Veterinary AI Diagnostics sales through 2034

France Veterinary AI Diagnostics companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Veterinary AI Diagnostics Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Veterinary AI Diagnostics distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Veterinary AI Diagnostics Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Veterinary AI Diagnostics market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Veterinary AI Diagnostics industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Veterinary AI Diagnostics industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation,

long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Veterinary AI Diagnostics Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Veterinary AI Diagnostics market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Veterinary AI Diagnostics market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Veterinary AI Diagnostics Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Veterinary AI Diagnostics Market Segmentation

By Offering Type

Software and Integrated Platforms

AI-Powered Diagnostic Devices and Hardware

Services

By Modality

AI Radiography / Medical Imaging

AI Hematology and Pathology Systems

AI Genomic and Molecular Testing

By Animal Type

Companion Animals

Livestock and Food-producing Animals

By Application

Infectious Disease Detection

Oncology and Tumor Assessment

Cardiology and Musculoskeletal Identification

Other Clinical Conditions

By End User

Veterinary Clinics and Reference Laboratories

Veterinary Hospitals

Research Centers and Academic Frameworks

Leading Companies in Veterinary AI Diagnostics Industry (2026)

Zoetis Inc.

IDEXX Laboratories, Inc.

Mars, Incorporated

SignalPET

Vetology LLC

VetCT

ImpriMed, Inc.

Scribenote Inc.

Digitail

OneCup AI

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia,
Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa,
Other Africa

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AI Radiography / Medical Imaging

AI Hematology and Pathology Systems

AI Genomic and Molecular Testing

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