

Veterinary Telemedicine Market by Type (Telephone, Internet), Component (Software & Services, Hardware), Application (Diagnosis & Treatment, Prescription, Follow-up, Consultation, Education), Animal Type (Companion, Livestock) & Region - Global Forecast to 2028

Market Report | 2023-08-21 | 173 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The global veterinary telemedicine market is projected to reach USD 1,230 million by 2028 from USD 530 million in 2023, at a CAGR of 18.3%. Growth in this market is largely driven by the increase in pet healthcare spending. Veterinary telemedicine has emerged as a convenient and cost-effective solution for pet owners seeking accessible and efficient healthcare options. By leveraging telecommunication technologies, pet owners can connect with veterinarians remotely, reducing the need for physical visits while still receiving expert guidance. This telemedicine approach offers convenience, saves time, and allows for timely interventions and ongoing monitoring of chronic conditions. As pet owners continue to prioritize their pets' health and seek convenient healthcare solutions, the demand for veterinary telemedicine is expected to grow, further driving the overall expenditure on pet care.

"The diagnosis and treatment segment holds the major share of the veterinary telemedicine market"

In 2022, the diagnosis and treatment segment holds the major share of the veterinary telemedicine market. A large share of the diagnosis and treatment segment can be attributed to the increased access to care, increasing adoption of telemedicine by veterinarians and reducing travel time and costs. The diagnosis and treatment segment in the veterinary telemedicine market is expected to continue to grow in the coming years. As the technology continues to improve and more veterinarians become comfortable using telemedicine, it is likely that this segment will become even more popular.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

"The companion animals segment holds the major share of the veterinary telemedicine market"

The companion animals segment holds the major share of the veterinary telemedicine market. A large share of the companion animals' segment can be attributed to the increase in the small companion animal population, growing pet care expenditure, the growing demand for pet insurance, and technological advancements in veterinary telemedicine devices/services for small companion animals. Telemedicine allows pet owners to connect with licensed veterinarians remotely through various communication channels, including video calls, phone calls, and online messaging platforms. It enables pet owners to seek advice, get prescriptions, and even receive follow-up care without the need for in-person visits.

"Asia Pacific will grow at highest CAGR during the forecast period"

In 2022, Asia Pacific will grow at highest CAGR during the forecast period. The high growth in this market can majorly be attributed to the rising companion animal population and the expansion of key players in the veterinary telemedicine market in several Asia Pacific countries such as India, China, and Thailand. The growing trend of pet ownership in APAC countries has resulted in increased pet healthcare expenditures. This can also be attributed to the growing disposable income levels in APAC countries, due to which the willingness to spend on animal healthcare and well-being is rising.

The break-up of the profile of primary participants in the veterinary telemedicine market (Supply Side):

- By Company Type: Tier 1 - 34%, Tier 2 - 38%, and Tier 3 - 28%
- By Designation: C Level - 26%, Director Level - 35%, Others-39%
- By Region: North America - 17%, Europe - 39%, Asia Pacific - 28%, Middle East - 8%, and Latin America - 8%

The break-up of the profile of primary participants in the veterinary telemedicine market (Demand Side):

- By End User: Veterinary Hospitals- 55%, Veterinary Clinics- 32%, Others-13%
- By Designation: Doctors-35%, Hospital Directors & Managers-27%, Critical Care Specialist-22%, Others-16%
- By Region: North America-17%, Europe-39%, Asia Pacific-28%, Latin America-8%, Middle East & Africa-8%

The prominent players in the veterinary telemedicine market include Vettriage (US), JustAnswer (US), Airvet (US), PetDesk (US), Pawsquad (UK), FirstVet (Sweden), Vetster (Canada), TeleVet (US), Anippanion (US), VitusVet (US), Whiskers Worldwide (US), WellHaven Pet Health (Canada), AskVet (US), Petriage (US), BI X GmbH (Germany), GuardianVets (US), TeleTails (US), Activ4Pets (US), BabelBark (US), Linkyvet (France), VetChat (Australia), VetCT (US), VetoClock (Spain), VetNow (US), Vetsource (US).

Research Coverage:

The report analyzes the veterinary telemedicine market and aims at estimating the market size and future growth potential of this market based on various segments such as type, component, application, animal type and region. The report also includes a product/service portfolio matrix of various veterinary telemedicine services available in the market. The report also provides a competitive analysis of the key players in this market, along with their company profiles, product/service offerings, and key market strategies.

Reasons to Buy the Report

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall veterinary telemedicine market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and to plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

This report provides insights into the following pointers:

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- Analysis of key drivers (increasing pet ownership, increasing prevalence of chronic diseases in animals, rising adoption of iot and ai by pet owners, increase in pet healthcare spending) restraints (high costs associated with the services, lack of awareness and accessibility to services), opportunities (the advancement of technology, increased access to specialists), and challenges (lack of reimbursement, acceptance by veterinarians) influencing the growth of the veterinary telemedicine market
- Product/Service Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product/service launches in the veterinary telemedicine market
- Market Development: Comprehensive information on the lucrative emerging markets by type, component, application, animal type and region.
- Market Diversification: Exhaustive information about new products/services or product/service enhancements, growing geographies, recent developments, and investments in the global veterinary telemedicine market.
- Competitive Assessment: In-depth assessment of market shares, growth strategies, product/service offerings, competitive leadership mapping, and capabilities of leading players like Vettriage (US), JustAnswer (US), Airvet (US), PetDesk (US), Pawsquad (UK) in the global veterinary telemedicine market.

Table of Contents:

| | |
|---|----|
| 1□INTRODUCTION□ | 25 |
| 1.1□STUDY OBJECTIVES□ | 25 |
| 1.2□MARKET DEFINITION□ | 25 |
| 1.2.1□TYPE□ | 25 |
| 1.2.2□COMPONENT□ | 26 |
| 1.2.3□APPLICATION□ | 26 |
| 1.2.4□INCLUSIONS AND EXCLUSIONS□ | 27 |
| 1.3□MARKET SCOPE□ | 28 |
| 1.3.1□MARKETS COVERED□ | 28 |
| FIGURE 1□VETERINARY TELEMEDICINE MARKET SEGMENTATION□ | 28 |
| 1.4□YEARS CONSIDERED□ | 29 |
| 1.5□SCOPE-RELATED LIMITATIONS□ | 29 |
| 1.6□STAKEHOLDERS□ | 29 |
| 1.7□RECESSION IMPACT□ | 30 |
| 2□RESEARCH METHODOLOGY□ | 31 |
| 2.1□RESEARCH DATA□ | 31 |
| FIGURE 2□RESEARCH DESIGN□ | 31 |
| 2.1.1□SECONDARY DATA□ | 32 |
| 2.1.1.1□Key data from secondary sources□ | 33 |
| 2.1.2□PRIMARY DATA□ | 33 |
| FIGURE 3□PRIMARY SOURCES□ | 33 |
| 2.1.2.1□Key data from primary sources□ | 34 |
| 2.1.2.2□Key industry insights□ | 35 |
| FIGURE 4□BREAKDOWN OF PRIMARY INTERVIEWS: SUPPLY-SIDE AND DEMAND-SIDE PARTICIPANTS□ | 35 |
| FIGURE 5□BREAKDOWN OF PRIMARY INTERVIEWS (SUPPLY SIDE): BY COMPANY TYPE, DESIGNATION, AND REGION□ | 36 |
| FIGURE 6□BREAKDOWN OF PRIMARY INTERVIEWS (DEMAND SIDE): BY END USER, DESIGNATION, AND REGION□ | 36 |
| 2.2□MARKET SIZE ESTIMATION□ | 37 |
| FIGURE 7□SUPPLY-SIDE MARKET SIZE ESTIMATION: REVENUE SHARE ANALYSIS□ | 38 |
| FIGURE 8□REVENUE SHARE ANALYSIS ILLUSTRATION: VETTRIAGE□ | 38 |
| FIGURE 9□CAGR PROJECTIONS FROM ANALYSIS OF DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES FOR VETERINARY TELEMEDICINE MARKET (2023-2028)□ | 40 |
| FIGURE 10□CAGR PROJECTIONS: SUPPLY-SIDE ANALYSIS□ | 40 |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

| | | |
|-----------|--|----|
| FIGURE 11 | TOP-DOWN APPROACH | 41 |
| FIGURE 12 | BOTTOM-UP APPROACH | 41 |
| ? | | |
| 2.3 | MARKET BREAKDOWN AND DATA TRIANGULATION | 42 |
| FIGURE 13 | DATA TRIANGULATION METHODOLOGY | 42 |
| 2.4 | MARKET SHARE ESTIMATION | 43 |
| 2.5 | STUDY ASSUMPTIONS | 43 |
| 2.6 | LIMITATIONS | 43 |
| 2.6.1 | METHODOLOGY-RELATED LIMITATIONS | 43 |
| 2.7 | RISK ASSESSMENT | 44 |
| TABLE 1 | RISK ASSESSMENT: VETERINARY TELEMEDICINE MARKET | 44 |
| 2.8 | RECESSION IMPACT | 44 |
| 3 | EXECUTIVE SUMMARY | 45 |
| FIGURE 14 | VETERINARY TELEMEDICINE MARKET, BY TYPE, 2023 VS. 2028 (USD MILLION) | 45 |
| FIGURE 15 | VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2023 VS. 2028 (USD MILLION) | 46 |
| FIGURE 16 | VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2023 VS. 2028 (USD MILLION) | 46 |
| FIGURE 17 | VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2023 VS. 2028 (USD MILLION) | 47 |
| FIGURE 18 | GEOGRAPHICAL SNAPSHOT OF VETERINARY TELEMEDICINE MARKET | 48 |
| 4 | PREMIUM INSIGHTS | 49 |
| 4.1 | VETERINARY TELEMEDICINE MARKET OVERVIEW | 49 |
| FIGURE 19 | INCREASING PET OWNERSHIP TO DRIVE MARKET | 49 |
| 4.2 | ASIA PACIFIC: VETERINARY TELEMEDICINE MARKET, BY TYPE AND COUNTRY (2022) | 50 |
| FIGURE 20 | INTERNET SEGMENT HELD LARGEST SHARE OF ASIA PACIFIC MARKET IN 2022 | 50 |
| 4.3 | VETERINARY TELEMEDICINE MARKET: GEOGRAPHIC GROWTH OPPORTUNITIES | 51 |
| FIGURE 21 | ASIA PACIFIC COUNTRIES TO REGISTER HIGHER GROWTH DURING FORECAST PERIOD | 51 |
| 4.4 | VETERINARY TELEMEDICINE MARKET: REGIONAL MIX | 52 |
| FIGURE 22 | NORTH AMERICA WILL CONTINUE TO DOMINATE MARKET DURING FORECAST PERIOD | 52 |
| 4.5 | VETERINARY TELEMEDICINE MARKET: DEVELOPED VS. DEVELOPING MARKETS | 53 |
| FIGURE 23 | DEVELOPING MARKETS TO REGISTER HIGHER GROWTH DURING FORECAST PERIOD | 53 |
| 5 | MARKET OVERVIEW | 54 |
| 5.1 | INTRODUCTION | 54 |
| 5.2 | MARKET DYNAMICS | 54 |
| FIGURE 24 | VETERINARY TELEMEDICINE MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES | 54 |
| 5.2.1 | DRIVERS | 55 |
| 5.2.1.1 | Increasing pet ownership | 55 |
| TABLE 2 | EUROPE: PET POPULATION, BY COUNTRY, 2014-2022 (MILLION) | 56 |
| 5.2.1.2 | Increasing prevalence of chronic diseases in animals | 56 |
| 5.2.1.3 | Rising adoption of IoT and AI by pet owners | 56 |
| 5.2.1.4 | Increase in pet healthcare spending | 57 |
| FIGURE 25 | US: PET INDUSTRY EXPENDITURE, 2010-2021 (USD BILLION) | 58 |
| TABLE 3 | US: BREAKDOWN OF PET INDUSTRY EXPENDITURE, 2020 VS. 2021 (USD BILLION) | 58 |
| 5.2.2 | RESTRAINTS | 59 |
| 5.2.2.1 | High cost associated with veterinary telemedicine services | 59 |

| | | |
|-----------|--|----|
| 5.2.2.2 | Lack of awareness and accessibility to services | 59 |
| 5.2.3 | OPPORTUNITIES | 60 |
| 5.2.3.1 | Advancements in technology | 60 |
| 5.2.3.2 | Increased access to specialists | 60 |
| 5.2.4 | CHALLENGES | 61 |
| 5.2.4.1 | Lack of reimbursement | 61 |
| 5.3 | INDUSTRY TRENDS | 61 |
| 5.3.1 | DEVELOPMENT OF NEW AND INNOVATIVE SERVICES | 61 |
| 5.3.2 | GROWTH OF SUBSCRIPTION MODEL | 62 |
| 5.4 | REGULATORY ANALYSIS | 62 |
| 5.4.1 | NORTH AMERICA | 62 |
| 5.4.1.1 | US | 63 |
| 5.4.1.2 | Canada | 63 |
| 5.4.2 | EUROPE | 63 |
| 5.4.3 | ASIA PACIFIC | 64 |
| 5.4.4 | LATIN AMERICA | 65 |
| 5.5 | REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS | 65 |
| TABLE 4 | LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS | 65 |
| 5.6 | VALUE CHAIN ANALYSIS | 68 |
| FIGURE 26 | VETERINARY TELEMEDICINE MARKET: VALUE CHAIN ANALYSIS | 69 |
| 5.7 | ECOSYSTEM MARKET MAP | 70 |
| FIGURE 27 | VETERINARY TELEMEDICINE MARKET: ECOSYSTEM ANALYSIS | 70 |
| 5.8 | PORTER'S FIVE FORCES ANALYSIS | 70 |
| TABLE 5 | PORTER'S FIVE FORCES ANALYSIS | 71 |
| 5.8.1 | THREAT OF NEW ENTRANTS | 71 |
| 5.8.2 | THREAT OF SUBSTITUTES | 71 |
| 5.8.3 | BARGAINING POWER OF SUPPLIERS | 71 |
| 5.8.4 | BARGAINING POWER OF BUYERS | 71 |
| 5.8.5 | INTENSITY OF COMPETITIVE RIVALRY | 71 |
| 5.9 | PATENT ANALYSIS | 72 |
| 5.9.1 | PATENT PUBLICATION TRENDS FOR VETERINARY TELEMEDICINE | 72 |
| FIGURE 28 | VETERINARY TELEMEDICINE MARKET: GLOBAL PATENT PUBLICATION TRENDS (2015-2023) | 72 |
| 5.9.2 | VETERINARY TELEMEDICINE MARKET: TOP APPLICANTS | 73 |
| FIGURE 29 | TOP APPLICANTS FOR VETERINARY TELEMEDICINE PATENTS (2015-2023) | 73 |
| 5.9.3 | JURISDICTION ANALYSIS: TOP APPLICANTS (COUNTRIES) FOR PATENTS | 73 |
| FIGURE 30 | JURISDICTION ANALYSIS: TOP APPLICANT COUNTRIES FOR VETERINARY TELEMEDICINE (2015-2023) | 73 |
| 5.10 | TECHNOLOGY ANALYSIS | 74 |
| 5.11 | PRICING MODEL ANALYSIS | 75 |
| TABLE 6 | AVERAGE SELLING PRICE OF VETERINARY TELEMEDICINE DEVICES AND SERVICES OFFERED BY LEADING PLAYERS | 75 |
| 5.12 | KEY CONFERENCES AND EVENTS | 75 |
| 5.12.1 | LIST OF KEY CONFERENCES AND EVENTS (2023-2025) | 75 |
| 5.13 | KEY STAKEHOLDERS AND BUYING CRITERIA | 76 |
| 5.13.1 | KEY STAKEHOLDERS IN BUYING PROCESS | 76 |
| FIGURE 31 | INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR VETERINARY TELEMEDICINE DEVICES AND SERVICES | 76 |
| TABLE 7 | INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR VETERINARY TELEMEDICINE DEVICES AND SERVICES | 76 |
| 5.13.2 | BUYING CRITERIA | 77 |
| FIGURE 32 | KEY BUYING CRITERIA FOR VETERINARY TELEMEDICINE DEVICES AND SERVICES | 77 |

| | | |
|----------|---|----|
| TABLE 8 | KEY BUYING CRITERIA FOR VETERINARY TELEMEDICINE DEVICES AND SERVICES | 77 |
| 6 | VETERINARY TELEMEDICINE MARKET, BY TYPE | 78 |
| 6.1 | INTRODUCTION | 79 |
| TABLE 9 | VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) | 79 |
| 6.2 | INTERNET | 79 |
| 6.2.1 | FASTEST-GROWING SEGMENT OF MARKET | 79 |
| TABLE 10 | INTERNET-BASED VETERINARY TELEMEDICINE MARKET, BY COUNTRY, 2021-2028 (USD MILLION) | 80 |
| 6.3 | TELEPHONE | 80 |
| 6.3.1 | OLDEST AND MOST ESTABLISHED SEGMENT | 80 |
| TABLE 11 | TELEPHONE-BASED VETERINARY TELEMEDICINE MARKET, BY COUNTRY, 2021-2028 (USD MILLION) | 81 |
| 7 | VETERINARY TELEMEDICINE MARKET, BY COMPONENT | 82 |
| 7.1 | INTRODUCTION | 83 |
| TABLE 12 | VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) | 83 |
| 7.2 | SOFTWARE & SERVICES | 83 |
| 7.2.1 | GROWING ADOPTION OF MOBILE DEVICES TO DRIVE MARKET | 83 |
| TABLE 13 | VETERINARY TELEMEDICINE SOFTWARE & SERVICES MARKET, BY COUNTRY, 2021-2028 (USD MILLION) | 84 |
| 7.3 | HARDWARE | 85 |
| 7.3.1 | ESSENTIAL COMPONENT OF VETERINARY TELEMEDICINE | 85 |
| TABLE 14 | VETERINARY TELEMEDICINE HARDWARE MARKET, BY COUNTRY, 2021-2028 (USD MILLION) | 86 |
| 8 | VETERINARY TELEMEDICINE MARKET, BY APPLICATION | 87 |
| 8.1 | INTRODUCTION | 88 |
| TABLE 15 | VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) | 88 |
| 8.2 | DIAGNOSIS AND TREATMENT | 88 |
| 8.2.1 | INCREASING DEMAND FOR CONVENIENT AND ACCESSIBLE VETERINARY CARE TO DRIVE MARKET | 88 |
| TABLE 16 | VETERINARY TELEMEDICINE MARKET FOR DIAGNOSIS AND TREATMENT, BY COUNTRY, 2021-2028 (USD MILLION) | 89 |
| 8.3 | PRESCRIPTION OF MEDICATION | 90 |
| 8.3.1 | CONVENIENT OPTION FOR PET OWNERS TO SEEK VETERINARY CARE REMOTELY | 90 |
| TABLE 17 | VETERINARY TELEMEDICINE MARKET FOR PRESCRIPTION OF MEDICATION, BY COUNTRY, 2021-2028 (USD MILLION) | 91 |
| 8.4 | FOLLOW-UP CARE | 91 |
| 8.4.1 | ESSENTIAL COMPONENT OF VETERINARY TELEMEDICINE | 91 |
| TABLE 18 | VETERINARY TELEMEDICINE MARKET FOR FOLLOW-UP CARE, BY COUNTRY, 2021-2028 (USD MILLION) | 92 |
| 8.5 | CONSULTATION WITH SPECIALISTS | 92 |
| 8.5.1 | RESULTS IN FASTER ACCESS TO SPECIALIZED OPINIONS | 92 |
| TABLE 19 | VETERINARY TELEMEDICINE MARKET FOR CONSULTATION WITH SPECIALISTS, BY COUNTRY, 2021-2028 (USD MILLION) | 93 |
| 8.6 | EDUCATION | 93 |
| 8.6.1 | EXPANDS ACCESS TO QUALITY EDUCATIONAL RESOURCES FOR VETERINARY PROFESSIONALS | 93 |
| TABLE 20 | VETERINARY TELEMEDICINE MARKET FOR EDUCATION, BY COUNTRY, 2021-2028 (USD MILLION) | 94 |
| 9 | VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE | 95 |
| 9.1 | INTRODUCTION | 96 |
| TABLE 21 | VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) | 96 |
| 9.2 | COMPANION ANIMALS | 96 |
| 9.2.1 | RIISING PET ADOPTION TO DRIVE MARKET | 96 |
| TABLE 22 | POPULATION OF SMALL COMPANION ANIMALS, BY COUNTRY, 2012-2020 (MILLION) | 97 |
| TABLE 23 | VETERINARY TELEMEDICINE MARKET FOR COMPANION ANIMALS, BY COUNTRY, 2021-2028 (USD MILLION) | 97 |
| 9.3 | LIVESTOCK | 98 |
| 9.3.1 | GROWING FOCUS ON REGULAR CHECKUPS TO SUPPORT MARKET GROWTH | 98 |
| TABLE 24 | VETERINARY TELEMEDICINE MARKET FOR LIVESTOCK, BY COUNTRY, 2021-2028 (USD MILLION) | 99 |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

?

9.4 OTHER ANIMALS 99

TABLE 25 VETERINARY TELEMEDICINE MARKET FOR OTHER ANIMALS, BY COUNTRY, 2021-2028 (USD MILLION) 100

10 VETERINARY TELEMEDICINE MARKET, BY REGION 101

10.1 INTRODUCTION 102

TABLE 26 VETERINARY TELEMEDICINE MARKET, BY REGION, 2021-2028 (USD MILLION) 102

10.2 NORTH AMERICA 102

10.2.1 NORTH AMERICA: RECESSION IMPACT 103

FIGURE 33 NORTH AMERICA: VETERINARY TELEMEDICINE MARKET SNAPSHOT 103

TABLE 27 NORTH AMERICA: VETERINARY TELEMEDICINE MARKET, BY COUNTRY, 2021-2028 (USD MILLION) 104

TABLE 28 NORTH AMERICA: VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) 104

TABLE 29 NORTH AMERICA: VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) 104

TABLE 30 NORTH AMERICA: VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) 105

TABLE 31 NORTH AMERICA: VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) 105

10.2.2 US 105

10.2.2.1 Large population of companion animals to drive market 105

FIGURE 34 US: POPULATION OF DOGS, 2012-2023 (MILLION) 106

FIGURE 35 US: PET INDUSTRY EXPENDITURE, 2018-2022 (USD BILLION) 106

TABLE 32 US: VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) 106

TABLE 33 US: VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) 107

TABLE 34 US: VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) 107

TABLE 35 US: VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) 107

10.2.3 CANADA 108

10.2.3.1 Rising pet and livestock population to support market growth 108

TABLE 36 CANADA: VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) 108

TABLE 37 CANADA: VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) 109

TABLE 38 CANADA: VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) 109

TABLE 39 CANADA: VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) 109

?

10.3 EUROPE 110

10.3.1 EUROPE: RECESSION IMPACT 110

TABLE 40 EUROPE: VETERINARY TELEMEDICINE MARKET, BY COUNTRY, 2021-2028 (USD MILLION) 111

TABLE 41 EUROPE: VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) 111

TABLE 42 EUROPE: VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) 111

TABLE 43 EUROPE: VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) 112

TABLE 44 EUROPE: VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) 112

10.3.2 GERMANY 112

10.3.2.1 Increasing awareness about pet healthcare to drive market 112

TABLE 45 GERMANY: VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) 113

TABLE 46 GERMANY: VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) 113

TABLE 47 GERMANY: VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) 114

TABLE 48 GERMANY: VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) 114

10.3.3 FRANCE 114

10.3.3.1 Rising pet ownership to support market growth 114

TABLE 49 FRANCE: VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) 115

TABLE 50 FRANCE: VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) 115

TABLE 51 FRANCE: VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) 115

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

| | | |
|-----------|---|-----|
| TABLE 52 | FRANCE: VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) | 116 |
| 10.3.4 | UK | 116 |
| 10.3.4.1 | Growing pet adoption to drive demand for veterinary telemedicine | 116 |
| TABLE 53 | UK: VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) | 117 |
| TABLE 54 | UK: VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) | 117 |
| TABLE 55 | UK: VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) | 117 |
| TABLE 56 | UK: VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) | 118 |
| 10.3.5 | ITALY | 118 |
| 10.3.5.1 | Rising demand for poultry and pork meat to support market growth | 118 |
| TABLE 57 | ITALY: VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) | 118 |
| TABLE 58 | ITALY: VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) | 119 |
| TABLE 59 | ITALY: VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) | 119 |
| TABLE 60 | ITALY: VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) | 119 |
| 10.3.6 | SPAIN | 120 |
| 10.3.6.1 | Increasing number of veterinary practices to drive market | 120 |
| TABLE 61 | SPAIN: VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) | 120 |
| TABLE 62 | SPAIN: VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) | 120 |
| TABLE 63 | SPAIN: VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) | 121 |
| TABLE 64 | SPAIN: VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) | 121 |
| 10.3.7 | REST OF EUROPE | 121 |
| TABLE 65 | REST OF EUROPE: VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) | 122 |
| TABLE 66 | REST OF EUROPE: VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) | 122 |
| TABLE 67 | REST OF EUROPE: VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) | 122 |
| TABLE 68 | REST OF EUROPE: VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) | 123 |
| 10.4 | ASIA PACIFIC | 123 |
| 10.4.1 | ASIA PACIFIC: RECESSION IMPACT | 123 |
| FIGURE 36 | ASIA PACIFIC: VETERINARY TELEMEDICINE MARKET SNAPSHOT | 124 |
| TABLE 69 | ASIA PACIFIC: VETERINARY TELEMEDICINE MARKET, BY COUNTRY, 2021-2028 (USD MILLION) | 125 |
| TABLE 70 | ASIA PACIFIC: VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) | 125 |
| TABLE 71 | ASIA PACIFIC: VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) | 125 |
| TABLE 72 | ASIA PACIFIC: VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) | 126 |
| TABLE 73 | ASIA PACIFIC: VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) | 126 |
| 10.4.2 | JAPAN | 126 |
| 10.4.2.1 | Increasing expenditure on pet healthcare to drive market | 126 |
| TABLE 74 | JAPAN: PRODUCTION AND CONSUMPTION OF ANIMAL-DERIVED FOOD PRODUCTS, 2000 VS. 2030 (THOUSAND METRIC TONS) | 127 |
| TABLE 75 | JAPAN: VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) | 127 |
| TABLE 76 | JAPAN: VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) | 128 |
| TABLE 77 | JAPAN: VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) | 128 |
| TABLE 78 | JAPAN: VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) | 128 |
| 10.4.3 | CHINA | 129 |
| 10.4.3.1 | Fastest-growing veterinary telemedicine market in Asia Pacific | 129 |
| TABLE 79 | CHINA: VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) | 129 |
| TABLE 80 | CHINA: VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) | 130 |
| TABLE 81 | CHINA: VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) | 130 |
| TABLE 82 | CHINA: VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) | 130 |
| 10.4.4 | INDIA | 131 |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

| | | |
|--|---|-----|
| 10.4.4.1 | Rising demand for meat and dairy products to support market growth | 131 |
| TABLE 83 | INDIA: PRODUCTION AND CONSUMPTION OF ANIMAL-DERIVED FOOD PRODUCTS, 2000 VS. 2030 (THOUSAND METRIC TONS) | 131 |
| TABLE 84 | INDIA: VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) | 132 |
| TABLE 85 | INDIA: VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) | 132 |
| TABLE 86 | INDIA: VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) | 132 |
| TABLE 87 | INDIA: VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) | 133 |
| 10.4.5 | REST OF ASIA PACIFIC | 133 |
| TABLE 88 | REST OF ASIA PACIFIC: VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) | 133 |
| TABLE 89 | REST OF ASIA PACIFIC: VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) | 134 |
| TABLE 90 | REST OF ASIA PACIFIC: VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) | 134 |
| TABLE 91 | REST OF ASIA PACIFIC: VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) | 134 |
| 10.5 | LATIN AMERICA | 135 |
| 10.5.1 | GROWING VETERINARY HEALTHCARE EXPENDITURE TO DRIVE MARKET | 135 |
| 10.5.2 | LATIN AMERICA: RECESSION IMPACT | 135 |
| TABLE 92 | LATIN AMERICA: VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) | 135 |
| TABLE 93 | LATIN AMERICA: VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) | 136 |
| TABLE 94 | LATIN AMERICA: VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) | 136 |
| TABLE 95 | LATIN AMERICA: VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) | 136 |
| 10.6 | MIDDLE EAST & AFRICA | 137 |
| 10.6.1 | GROWING PREVALENCE OF ANIMAL DISEASES TO PROPEL MARKET | 137 |
| 10.6.2 | MIDDLE EAST & AFRICA: RECESSION IMPACT | 137 |
| TABLE 96 | MIDDLE EAST & AFRICA: VETERINARY TELEMEDICINE MARKET, BY TYPE, 2021-2028 (USD MILLION) | 137 |
| TABLE 97 | MIDDLE EAST & AFRICA: VETERINARY TELEMEDICINE MARKET, BY COMPONENT, 2021-2028 (USD MILLION) | 138 |
| TABLE 98 | MIDDLE EAST & AFRICA: VETERINARY TELEMEDICINE MARKET, BY APPLICATION, 2021-2028 (USD MILLION) | 138 |
| TABLE 99 | MIDDLE EAST & AFRICA: VETERINARY TELEMEDICINE MARKET, BY ANIMAL TYPE, 2021-2028 (USD MILLION) | 138 |
| 11 | COMPETITIVE LANDSCAPE | 139 |
| 11.1 | INTRODUCTION | 139 |
| 11.2 | MARKET SHARE ANALYSIS | 139 |
| FIGURE 37 | VETERINARY TELEMEDICINE MARKET SHARE, BY KEY PLAYER (2022) | 139 |
| 11.3 | COMPANY FOOTPRINT ANALYSIS | 140 |
| 11.3.1 | COMPANY FOOTPRINT, BY TYPE | 140 |
| 11.3.2 | COMPANY FOOTPRINT, BY REGION | 141 |
| 11.4 | COMPANY EVALUATION MATRIX | 142 |
| 11.4.1 | STARS | 142 |
| 11.4.2 | EMERGING LEADERS | 142 |
| 11.4.3 | PERVASIVE PLAYERS | 142 |
| 11.4.4 | PARTICIPANTS | 142 |
| FIGURE 38 | VETERINARY TELEMEDICINE MARKET: COMPANY EVALUATION MATRIX | 143 |
| 11.5 | COMPETITIVE BENCHMARKING | 144 |
| TABLE 100 | VETERINARY TELEMEDICINE MARKET: KEY STARTUPS/SMES | 144 |
| 12 | COMPANY PROFILES | 145 |
| 12.1 | KEY PLAYERS | 145 |
| (Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats))* | | |
| 12.1.1 | VETTRIAGE | 145 |
| TABLE 101 | VETTRIAGE: BUSINESS OVERVIEW | 145 |

| | | |
|-----------|---|-----|
| 12.1.2 | JUSTANSWER | 146 |
| TABLE 102 | JUSTANSWER: BUSINESS OVERVIEW | 146 |
| 12.1.3 | AIRVET | 147 |
| TABLE 103 | AIRVET: BUSINESS OVERVIEW | 147 |
| 12.1.4 | FIRSTVET | 148 |
| TABLE 104 | FIRSTVET: BUSINESS OVERVIEW | 148 |
| 12.1.5 | VETSTER | 149 |
| TABLE 105 | VETSTER: BUSINESS OVERVIEW | 149 |
| 12.1.6 | TELEVET | 150 |
| TABLE 106 | TELEVET: BUSINESS OVERVIEW | 150 |
| 12.1.7 | ANIPANION | 151 |
| TABLE 107 | ANIPANION: BUSINESS OVERVIEW | 151 |
| 12.1.8 | VITUSVET | 152 |
| TABLE 108 | VITUSVET: BUSINESS OVERVIEW | 152 |
| 12.1.9 | WHISKERS WORLDWIDE | 153 |
| TABLE 109 | WHISKERS WORLDWIDE: BUSINESS OVERVIEW | 153 |
| 12.1.10 | WELLHAVEN PET HEALTH | 154 |
| TABLE 110 | WELLHAVEN PET HEALTH: BUSINESS OVERVIEW | 154 |
| 12.1.11 | ASKVET | 155 |
| TABLE 111 | ASKVET: BUSINESS OVERVIEW | 155 |
| 12.1.12 | PETRIAGE | 156 |
| TABLE 112 | PETRIAGE: BUSINESS OVERVIEW | 156 |
| 12.1.13 | PETDESK | 157 |
| TABLE 113 | PETDESK: BUSINESS OVERVIEW | 157 |
| 12.1.14 | PAWSQUAD | 158 |
| TABLE 114 | PAWSQUAD: BUSINESS OVERVIEW | 158 |
| 12.1.15 | BI X GMBH | 159 |
| TABLE 115 | BI X GMBH: BUSINESS OVERVIEW | 159 |
| 12.1.16 | GUARDIANVETS | 160 |
| TABLE 116 | GUARDIANVETS: BUSINESS OVERVIEW | 160 |
| 12.1.17 | TELETAILS | 161 |
| TABLE 117 | TELETAILS: BUSINESS OVERVIEW | 161 |
| 12.1.18 | ACTIV4PETS | 162 |
| TABLE 118 | ACTIV4PETS: BUSINESS OVERVIEW | 162 |
| 12.1.19 | BABELBARK | 163 |
| TABLE 119 | BABELBARK: BUSINESS OVERVIEW | 163 |
| 12.1.20 | LINKYVET | 164 |
| TABLE 120 | LINKYVET: BUSINESS OVERVIEW | 164 |
| 12.1.21 | VETCHAT | 165 |
| TABLE 121 | VETCHAT: BUSINESS OVERVIEW | 165 |
| 12.1.22 | VETCT | 166 |
| TABLE 122 | VETCT: BUSINESS OVERVIEW | 166 |
| 12.1.23 | VETOCLOCK | 167 |
| TABLE 123 | VETOCLOCK: BUSINESS OVERVIEW | 167 |
| 12.1.24 | VETNOW | 168 |
| TABLE 124 | VETNOW: BUSINESS OVERVIEW | 168 |
| 12.1.25 | VETSOURCE | 169 |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 125 VETSOURCE: BUSINESS OVERVIEW 169

*Details on Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

?

13 APPENDIX 170

13.1 DISCUSSION GUIDE 170

13.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL 175

13.3 CUSTOMIZATION OPTIONS 177

13.4 RELATED REPORTS 177

13.5 AUTHOR DETAILS 178

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Veterinary Telemedicine Market by Type (Telephone, Internet), Component (Software & Services, Hardware), Application (Diagnosis & Treatment, Prescription, Follow-up, Consultation, Education), Animal Type (Companion, Livestock) & Region - Global Forecast to 2028

Market Report | 2023-08-21 | 173 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

| Select license | License | Price |
|----------------|-------------------------|------------|
| | Single User | \$4950.00 |
| | Multi User | \$6650.00 |
| | Corporate License | \$8150.00 |
| | Enterprise Site License | \$10000.00 |
| | | VAT |
| | | Total |

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

| | | | |
|---------------|----------------------|-------------------------------|----------------------|
| Email* | <input type="text"/> | Phone* | <input type="text"/> |
| First Name* | <input type="text"/> | Last Name* | <input type="text"/> |
| Job title* | <input type="text"/> | | |
| Company Name* | <input type="text"/> | EU Vat / Tax ID / NIP number* | <input type="text"/> |
| Address* | <input type="text"/> | City* | <input type="text"/> |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code*

Country*

Date

Signature