

Veterinary Diagnostic Imaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

Veterinary Diagnostic Imaging Market Analysis

The Veterinary Diagnostic Imaging Market size is estimated at USD 1.84 billion in 2025, and is expected to reach USD 2.62 billion by 2030, at a CAGR of 7.31% during the forecast period (2025-2030). The expansion reflects stronger demand for advanced screening as companion-animal owners seek human-equivalent care, wider clinical use of AI-assisted interpretation, and steady rollout of digital radiography, multi-slice CT, and other modalities. North America remains the revenue leader, while Asia Pacific records the fastest gains as rising disposable income and pet humanization reshape spending patterns. Equipment upgrades toward digital platforms, growth in oncology imaging, and regulatory livestock programs add further momentum. Structural headwinds such as shortages of board-certified radiologists and high capital costs persist but continue to spur interest in teleradiology and AI decision-support tools.

Global Veterinary Diagnostic Imaging Market Trends and Insights

Growing Global Companion-Animal Population Fuelling Expenditure on Advanced Imaging Modalities

Pet ownership among younger households is reshaping spending priorities and lifting routine demand for imaging beyond acute care. Pet insurance that reimburses X-rays and MRI lowers cost barriers, with MRI reimbursements ranging between USD 2,500 and USD 6,000, encouraging broader clinical use. Asia's rapid rise in pet numbers, particularly in China and India, extends the customer base and opens niches for exotics and specialty services. Clinics such as Ohana Veterinary in Kuala Lumpur already

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employ AI-driven analyzers that benchmark blood and image data against global databases, demonstrating how demographic change directly translates into technology adoption. The sustained humanization narrative underpins long-term procedure volume growth, making advanced diagnostics part of routine wellness care rather than last-resort investigations.

Rapid Technological Innovations in Digital Radiography, Multi-slice CT and AI-based Image Analytics

Deep-learning algorithms embedded in systems such as Vetscan Imagyst flag abnormalities within seconds, raising diagnostic confidence and reinforcing client compliance. Professional bodies now publish guidance on validation and transparency, signaling an alignment between regulators and innovators. Photon-counting CT and zero-helium MRI units improve image clarity while trimming radiation dose and maintenance complexity, widening appeal among mid-sized practices. Early adopters report faster throughput and higher diagnostic yield, creating a competitive gap that presses lagging clinics to upgrade infrastructure. Collectively, technology convergence accelerates the replacement cycle and drives incremental equipment revenue within the veterinary diagnostic imaging market.

Global Shortage of Board-Certified Veterinary Radiologists and Trained Imaging Technicians

Despite rising interest in imaging careers, training capacity remains flat, leading to a constrained talent pipeline that could leave a shortfall of more than 17,000 veterinarians by 2032, with imaging specialists among the scarcest. The scarcity lengthens report turnaround times and limits the range of services smaller clinics can provide. Providers increasingly turn to teleradiology partnerships and AI-based preliminary reads to maintain service levels. While stop-gaps partly offset workload pressure, the underlying shortage continues to cap throughput, restraining the full growth potential of the veterinary diagnostic imaging market.

Other drivers and restraints analyzed in the detailed report include:

Rising Burden of Chronic & Orthopedic Disorders in Pets Necessitating Early Diagnostic Imaging / Government-Led Livestock Disease Surveillance Programs Mandating Imaging-Based Screening / High Capital & Lifecycle Cost of High-Field MRI and Multi-slice CT Systems for Smaller Practices /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Radiography systems retained the largest revenue slice at 35.64% in 2024, demonstrating their role as the workhorse modality across companion-animal practice. The intuitive workflows, near-instant image availability, and lower radiation dose that accompany digital platforms encourage clinics to replace legacy film units, sustaining a vital pillar of the veterinary diagnostic imaging market. Ultrasound, bolstered by handheld probes and cloud-based AI triage, broadens access in first-opinion settings and farm calls.

Cone-beam CT units packaged in compact footprints unlock 3-D imaging for dental, orthopedic, and oncology cases within general practice environments. MRI, though premium in cost, differentiates referral centers, especially with innovations such as zero-helium magnets that mitigate helium supply risk and lower operational overhead. Video endoscopy, forecast to climb at an 8.84% CAGR, benefits from rising minimally invasive procedures and GI case complexity. Together, these trends keep the equipment landscape dynamic and spur continuous upgrades within the veterinary diagnostic imaging market

Orthopedics controlled 34.45% of 2024 revenue and remains core in small-animal referral workups, particularly for cruciate ligament, elbow dysplasia, and fracture management. Digital radiography allows rapid follow-up post-surgery, while 3-D CT refines

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pre-operative planning through virtual templating. In contrast, oncology claims the fastest trajectory with a 9.63% CAGR as early screening protocols penetrate routine check-ups. AI segmentation tools locate pulmonary nodules or abdominal masses at millimeter resolution, supporting treatment decisions and prognosis discussions.

Cardiology maintains stable demand through echocardiography and cardiovascular CT, helped by motion-compensating algorithms that capture accurate data despite respiratory and heart movement. Neurology benefits from standing MRI in equine and large breed dogs, mitigating anesthesia risk and post-procedure recovery time. Dentistry and gastroenterology leverage portable X-ray and high-definition endoscopes that broaden point-of-care capabilities. Cross-discipline blending of imaging and lab biomarkers solidifies imaging as the central pillar in multimodal diagnostics for the veterinary diagnostic imaging market.

The Veterinary Diagnostic Imaging Market Report is Segmented by Equipment (Radiography (X-Ray) Systems, Ultrasound Imaging Systems, and More), Application (Cardiology, Oncology, Neurology, and More), Animal Type (Small Animals, Large Animals), End User (Veterinary Hospitals & Clinics, Diagnostic Centers, and More), and Geography (North America, Europe, and More). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America retained a 41.83% share in 2024, anchored by high per-capita pet expenditures, mature insurance uptake, and dense specialty hospital networks. The United States continues to upgrade its digital infrastructure and adopt AI, yet it also grapples with acute radiologist shortages that accelerate teleradiology outsourcing. Canada's strict radiation-safety codes prolong installation timelines but safeguard staff and animal welfare.

Europe delivers steady progress thanks to robust regulation and reimbursement structures. Germany and France sustain equipment renewal cycles, while the United Kingdom's radiologist gap triggers policy discussion and increased AI pilot programs. EU-wide animal health strategies encourage cross-border knowledge exchange, reinforcing homogeneity in standards and supporting regional vendors.

Asia Pacific leads growth at a 9.32% CAGR as disposable incomes rise and millennials prioritize pet wellness. China's urban market sees chain clinics adopting CT as a differentiator, whereas India's emerging middle class lifts baseline demand for ultrasound and digital X-ray. Japan targets geriatric pet care, rolling out home-visit services equipped with portable imaging. Government programs across Australia and New Zealand strengthen livestock imaging to protect export revenue streams. Together, these dynamics underpin sustained expansion of the veterinary diagnostic imaging market in the region.

List of Companies Covered in this Report:

Canon / GE Healthcare / FUJIFILM / IDEXX / Siemens Healthineers / Esaote S.p.A. / Carestream Health / Hallmarq Veterinary Imaging Ltd. / Cuattro / Epica Animal Health / Bionet America, Inc / Antech Diagnostics (Mars, Inc.) / Sedecal USA / Agfa-Gevaert / Mindray / Koninklijke Philips /

Additional Benefits:

 The market estimate (ME) sheet in Excel format /
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