

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

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Report description:

Veterinary Services Market Analysis

The veterinary services market size is valued at USD 128.73 billion in 2025 and is forecast to reach USD 163.52 billion by 2030, advancing at a 4.91% CAGR. Healthy pet-owner spending, rapid technology adoption, and sustained corporate buy-outs keep the veterinary services market on an expansion path. Preventive medicine captures demand as households shift from episodic to continuous care, while artificial intelligence raises diagnostic throughput and supports busy clinicians. Private-equity and strategic buyers accelerate roll-up activity to secure scale economies, data assets, and talent pools. Demand also grows outside companion care: zoonotic-disease surveillance, livestock productivity mandates, and One-Health policy frameworks widen the revenue base of the veterinary services market.

Global Veterinary Services Market Trends and Insights

Rising Pet Ownership & Humanisation of Animals

Pet ownership reached 94 million U.S. households in 2025, up from 56 million in 2011, and Generation Z now represents the fastest-growing cohort of new owners. This demographic expects oncology, cardiology, and behavioural therapies once reserved for human medicine. High-net-worth clients also purchase concierge plans that bundle genomic screening, nutrition counselling, and 24/7 tele-access to specialists. Such premiumisation strengthens cash-flow visibility across the veterinary services market while justifying equipment upgrades and specialist training.

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Increasing Incidence of Zoonotic & Chronic Animal Diseases

The 2024 H5N1 influenza episode affected more than 800 U.S. dairy herds, with 66 confirmed human infections traced to animal exposure. Companion pets live longer, which increases chronic conditions: 73% of dogs and 64% of cats were diagnosed with dental disease in 2024. These dual pressures support sustained laboratory, imaging, and bio-security spending within the veterinary services market.

Global Shortage & Burnout of Veterinarians

Forecasts show a deficit of 70,092 veterinarians by 2032 versus only 52,926 graduates, a shortfall aggravated by student debt that averages USD 400,000. Burnout exceeds 40%, and suicide risk remains elevated, pressuring clinic rosters in the veterinary services industry. Rural zones suffer most, with 243 U.S. counties classified as shortage areas in 2025.

Other drivers and restraints analyzed in the detailed report include:

Growing Livestock Productivity & Food-Safety Requirements / AI-Enabled Triage & Diagnostics Boosting Clinic Capacity / Escalating Cost of Advanced Procedures & Equipment /

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

Segment Analysis

Preventive and wellness care captured 31.34% of 2024 revenue, anchoring the veterinary services market. Subscription wellness plans and annual health screens generate predictable margins, while pharmacy auto-refills deepen client stickiness. The veterinary services market size for tele-health is set to climb from USD 369.17 million in 2025 to USD 1.96 billion by 2034, a 6.54% CAGR. AI-enhanced imaging lifts throughput and supports surge capacity. Surgical demand stabilises as minimally-invasive techniques cut recovery time. Dental procedures remain lucrative, averaging USD 170-350 per case, and 73% of dogs need at least one intervention during their lifetime.

Diagnostic laboratories enjoy cross-selling with clinics, and e-prescribing platforms streamline drug compliance. Emergency and critical-care centres face labour constraints, prompting corporate groups to open 24-hour hubs linked by tele-ICU dashboards. Rehabilitation, acupuncture, and hydro-therapy gain traction as pets age, extending lifetime spending in the veterinary services market.

Companion animals constituted 63.23% of revenue in 2024 and will post the fastest 6.74% CAGR through 2030. Dogs continue as the largest sub-segment, with oncology and cardiology services mirroring human care protocols. Urban cat ownership rises among millennials and Generation Z, pushing demand for feline-only clinics. Equine medicine remains niche but commands high average transaction values for lameness diagnostics and sports-injury rehabilitation.

Production animals demand service integration after the H5N1 dairy-herd outbreak highlighted public-health risks. Cattle operators now purchase real-time monitoring and vaccine-compliance audits. Swine and poultry producers expand comprehensive bio-security packages, and aquaculture ventures request specialised health plans, both adding breadth to the veterinary services market. Small ruminants gain attention as consumers diversify protein sources, further widening the client base.

The Veterinary Services Market Report is Segmented by Service (Surgery, Diagnostic Imaging & Laboratory, and More), Animal Type (Companion Animals and Production/Farm Animals), Provider Ownership Structure (Independent Practices, and More),

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Delivery Mode (Mobile / On-Farm, and More), Geography (North America, Europe, Asia-Pacific, and More). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America retained 42.45% of global revenue in 2024. Mature insurance penetration, robust e-commerce pharmacy channels, and One-Health policy integration sustain premium-price elasticity. Multinational chains cluster around U.S. urban centres, and Canadian operators observe similar consolidation but tailor offerings to public-health mandates. Mexico's rising middle class fuels double-digit pet-food growth, a signal of downstream service opportunity.

Europe shows steady uptake. The United Kingdom's Royal College of Veterinary Surgeons streamlines accreditation, facilitating cross-border clinician mobility. Germany and France invest in surveillance platforms that link animal and human epidemiological data. EQT's acquisition of VetPartners indicates capital inflows aiming at clinic platform scaling across member states. Regulatory harmonisation for tele-medicine and prescription data interoperability aids clinic groups in capturing operational synergies across the veterinary services market.

Asia-Pacific is the fastest-expanding zone at 5.65% CAGR. China's pet-medical spend hit 1,062 billion yuan in 2024 and keeps rising despite fragmentation. India's pet-food market is growing at 15.37% CAGR and pulls ancillary services such as dietetic consults and dermatology. Japan's super-aging dogs spur demand for geriatric care, while South Korea pioneers AI algorithms for small-animal imaging. Australia's clinic roll-ups attract European buyers hunting for exposure to a high-compliance market. Collectively, these dynamics enlarge the veterinary services market size for the region.

List of Companies Covered in this Report:

Mars Inc. (VCA, Banfield, BluePearl) / National Veterinary Associates (NVA) / CVS Group / IVC Evidensia / Greencross Ltd / Ethos Veterinary Health / IDEXX / Zoetis Services / Elanco Animal Health Services / Southern Veterinary Partners / Thrive Pet Healthcare / VetCor / PetVet Care Centers / Mission Veterinary Partners / BlueRiver Pet Care / FirstVet / CityVet / Armor Animal Health / Kremer Veterinary Services / I-Med Animal Referral Centers /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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