

Pet Cancer Therapeutics Market Report by Therapy (Chemotherapy, Radiation Therapy, Immunotherapy, Combination Therapy, and Others), Animal Species (Cats, Dogs, and Others), Cancer Type (Lymphoma, Mast Cell Cancer, Melanoma, Mammary and Squamous Cell Cancer, and Others), End User (Veterinary Hospitals and Clinical Pharmacies, Retail Pharmacies, Online Pharmacies, and Others), and Region 2024-2032

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Abstracts

The global pet cancer therapeutics market size reached US\$ 295.2 Million in 2023. Looking forward, IMARC Group expects the market to reach US\$ 635.9 Million by 2032, exhibiting a growth rate (CAGR) of 8.5% during 2024-2032. The increasing pet ownership rates and human-animal bond, advancements in veterinary medicine and research, and growing awareness about the availability and benefits of pet cancer therapeutics are some of the major factors propelling the market.

Pet cancer therapeutics are specialized medical treatments and drugs designed to diagnose, treat, and manage cancer in animals, particularly in dogs and cats. Similar to cancer treatments in humans, these therapeutics may include chemotherapy, radiation therapy, immunotherapy, targeted therapies, and palliative care. Veterinary oncologists administer these therapies to address various types of cancer in pets and improve their quality of life. As advancements in veterinary medicine continue, the availability and effectiveness of pet cancer therapeutics have increased, allowing pet owners to access comprehensive and compassionate care for their beloved animal companions diagnosed with cancer.

The rising willingness among pet owners to invest in advanced medical treatments, including cancer therapeutics, to ensure the well-being of their animal companions due to the increasing pet ownership and human-animal bond, will stimulate the growth of the market during the forecast period. Moreover, the growing prevalence of cancer in pets, owing to improved diagnostic capabilities and prolonged lifespan has augmented the demand for effective and specialized treatments. Apart from this, numerous advancements in veterinary oncology and research, including the development of more targeted and innovative cancer therapies for pets, have catalyzed the market growth. Additionally, the heightening awareness among pet owners about the availability and benefits of pet cancer therapeutics has led to early detection and intervention, propelling the market growth. Furthermore, the establishment of specialized veterinary oncology centers and the rising collaborations between veterinary and human oncologists that improve the accessibility and expertise in pet cancer care are contributing to the market growth.

Pet Cancer Therapeutics Market Trends/Drivers:

Increasing pet ownership and human-animal bond

The rise in pet ownership and the strengthening human-animal bond have become significant drivers in the market for pet cancer therapeutics. As more households welcome pets into their lives, these companion animals are widely considered cherished family members. This emotional connection fosters a deep sense of responsibility among pet owners to ensure the well-being and health of their furry companions. Consequently, there is a growing willingness among pet owners to invest in advanced cancer treatments to combat the disease and enhance the quality of life for pets. Pet owners seek the best possible care for their pets, leading to an increased demand for effective cancer therapeutics that can alleviate suffering and prolong their pets' lives.

Advancements in veterinary oncology

The field of veterinary oncology has witnessed remarkable progress in recent years, owing to technological advancements and research breakthroughs. Improved diagnostic techniques enable early and accurate cancer detection, empowering veterinarians to initiate timely treatment. Moreover, the rise in understanding of cancer biology in pets has opened doors to targeted therapies, immunotherapies, and novel treatment modalities. Veterinary oncologists now have an expanded toolbox of cancer treatments, facilitating the development of personalized care plans tailored to each pet's unique

condition. These advancements instill hope in pet owners facing a cancer diagnosis for their beloved animals and encourage them to explore and opt for advanced and effective cancer therapies.

Growing veterinary healthcare expenditure

The changing perception of pets from mere animal companions to valued family members has led to a notable shift in spending patterns on veterinary healthcare. Pet owners today are more willing than ever to allocate substantial financial resources to ensure their pets' well-being and longevity. The growing awareness of available cancer treatment options and the desire to provide the best possible care have driven the increase in expenditure on pet cancer therapeutics. Owners are willing to invest in the latest and most effective cancer treatments to combat the disease and improve the overall health and happiness of their furry companions. This surge in veterinary healthcare spending further propels the pet cancer therapeutics market, creating opportunities for research, innovation, and the development of advanced cancer treatment options for pets.

Pet Cancer Therapeutics Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global pet cancer therapeutics market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on therapy, animal species, cancer type and end user.

Breakup by Therapy:

Chemotherapy

Radiation Therapy

Immunotherapy

Combination Therapy

Others

Chemotherapy dominates the market

The report has provided a detailed breakup and analysis of the market based on the therapy. This includes chemotherapy, radiation therapy, immunotherapy, combination therapy, and others. According to the report, chemotherapy represented the largest segment.

Chemotherapy is widely used as a standard treatment for various types of pet cancers. As a potent and systematic approach, chemotherapy targets rapidly dividing cancer cells, inhibiting their growth and spread. Its ability to treat a wide range of cancers, including lymphoma, mast cell tumors, and osteosarcoma, makes it a versatile and essential therapeutic option for veterinary oncologists.

Moreover, advancements in veterinary medicine have led to the development of more targeted and less toxic chemotherapy regimens, reducing adverse effects and improving the overall quality of life for pets undergoing treatment. The increasing prevalence of pet cancer cases, coupled with the growing awareness among pet owners about available treatment options, further contributes to the expansion of the chemotherapy segment.

Breakup by Animal Species:

Cats

Dogs

Others

Dogs hold the largest share in the market

A detailed breakup and analysis of the market based on the animal species has also been provided in the report. This includes cats, dogs, and others. According to the report, dogs accounted for the largest market share.

Dogs have a higher susceptibility to various types of cancers, mirroring human conditions. As a popular companion animal, dogs are commonly affected by cancers such as lymphoma, melanoma, and mammary tumors, among others. The similarities in cancer biology and tumor types between dogs and humans make dogs valuable models for studying cancer treatments, leading to advancements in therapeutic approaches that

benefit both species. Veterinary oncology research conducted in dogs has resulted in the development of targeted therapies, immunotherapies, and novel treatment modalities that can be translated to human medicine. Furthermore, the strong emotional bond between pet owners and their dogs fosters a willingness to invest in their healthcare, including cancer treatments, thus driving the demand for effective pet cancer therapeutics.

Breakup by Cancer Type:

Lymphoma

Mast Cell Cancer

Melanoma

Mammary and Squamous Cell Cancer

Others

Mast cell cancer represents the most popular type of cancer

The report has provided a detailed breakup and analysis of the market based on the cancer type. This includes lymphoma, mast cell cancer, melanoma, mammary and squamous cell cancer, and others. According to the report, mast cell cancer represented the largest segment.

Mast cell tumors are one of the most common skin cancers in dogs, affecting various breeds and age groups. Their diverse behavior and variable response to treatments necessitate specialized therapeutics for effective management. Veterinary oncologists are continually researching and developing targeted therapies and immunotherapies specifically tailored to combat mast cell cancer. As a result, advancements in pet cancer therapeutics for mast cell tumors benefit dogs as well as contribute to the broader understanding and treatment of mast cell-related conditions in humans. The increasing awareness among pet owners about the need for early detection and comprehensive treatment options further drives the demand for innovative and efficient pet cancer therapeutics.

Breakup by End User:

Veterinary Hospitals and Clinical Pharmacies

Retail Pharmacies

Online Pharmacies

Others

Veterinary hospitals and clinical pharmacies account for the largest market share

The report has provided a detailed breakup and analysis of the market based on the end-user. This includes veterinary hospitals and clinical pharmacies, retail pharmacies, online pharmacies, and others. According to the report, veterinary hospitals and clinical pharmacies represented the largest segment.

Veterinary hospitals and clinical pharmacies play a crucial role in driving the pet cancer therapeutics market by serving as key distribution and treatment centers for specialized pet cancer drugs and therapies. These institutions provide a centralized platform for pet owners to access a wide range of cancer treatments, including chemotherapy agents, targeted therapies, and immunotherapies. Veterinary hospitals collaborate with pharmaceutical companies and research institutions to stay updated on the latest advancements in pet cancer therapeutics, offering cutting-edge treatment options to their patients. Clinical pharmacies within these facilities ensure accurate drug dispensing and administration, adhering to precise dosages and treatment protocols. Their expertise in handling pet cancer therapeutics and providing personalized care contributes to improved treatment outcomes and enhances pet owners' confidence in seeking optimal cancer care for their beloved animal companions, ultimately driving the growth of the pet cancer therapeutics market.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance in the market

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada), Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia and Others), Europe (Germany, France, the United Kingdom, Italy, Spain, Russia and Others) Latin America (Brazil, Mexico and Others), Middle East and Africa. According to the report, North America accounted for the largest market share.

North America held the biggest share in the market since the region has a high prevalence of pet ownership, and there is a strong bond between pet owners and their animals, leading to a greater willingness to invest in their healthcare, including cancer treatment. North America is also at the forefront of advancements in veterinary medicine and oncology research, resulting in the development of innovative and targeted pet cancer therapeutics. Veterinary hospitals and research institutions in the region collaborate closely with pharmaceutical companies to conduct clinical trials and introduce cutting-edge treatments to the market. Additionally, the presence of well-established veterinary healthcare infrastructure and a growing trend of personalized pet care contribute to the demand for specialized and effective cancer therapies. These factors collectively drive the growth of the market for pet cancer therapeutics in North America, making it a leading region in the industry.

Competitive Landscape:

The market is experiencing steady growth in recent years as various key players are focusing on the development of targeted therapies and immunotherapies tailored to specific types of pet cancers, aiming to enhance treatment effectiveness and reduce side effects. Numerous advancements in precision medicine by leading players have led to the identification of genetic and molecular biomarkers, allowing for personalized treatment approaches. Additionally, novel drug delivery methods, such as nanoparticles and liposomes, are being explored by manufacturers to improve drug stability and enhance tumor penetration. The integration of emerging technologies like artificial intelligence (AI) and machine learning (ML) in pet cancer research is revolutionizing data analysis and accelerating drug discovery processes. We also expect the market to witness new entrants, consolidation of product portfolios, rise in research and development (R&D) initiatives, and increased strategic collaborations to drive healthy

competition within the pet cancer therapeutics domain.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

AB Science

Boehringer Ingelheim International GmbH

Elanco Animal Health Incorporated

ELIAS Animal Health LLC

Karyopharm Therapeutics

Pfizer Inc.

Regeneus Ltd.

Rhizen Pharmaceuticals AG

Torigen Pharmaceuticals Inc.

VetDC Inc.

Virbac

Zoetis Inc.

Recent Developments:

In July 2023, Boehringer Ingelheim International GmbH, a leading pharmaceutical company, received approval from the U.S. Food and Drug Administration (FDA) for its innovative product, NexGard PLUS. This groundbreaking advancement in pet healthcare introduces a chewable tablet specifically designed to safeguard dogs from both internal and external parasites. The tablet contains a powerful combination of active ingredients,

including afoxolaner, moxidectin, and pyrantel, which work synergistically to provide comprehensive protection against common parasitic threats.

In Dec 2022, Elanco Animal Health Incorporated, a prominent animal health company, announced a groundbreaking achievement with the FDA approval of Bexacat (bexagliflozin tablets). Bexacat marks a significant milestone as the first-of-its-kind oral treatment option for feline diabetes. This pioneering medication introduces a novel approach to managing diabetes in cats, addressing an unmet medical need in the veterinary industry. Bexacat, formulated as easily administered tablets, offers a promising solution for feline diabetes management, providing veterinarians and pet owners with an effective and convenient alternative to traditional insulin injections.

In Nov 2021, ELIAS Animal Health LLC, a leading biotechnology company specializing in cancer therapeutics for pets, announced a significant development in the field of oncolytic virotherapy. The company has successfully obtained an exclusive in-license from Genelux Corporation for their cutting-edge Oncolytic Vaccinia Virus Treatment. This groundbreaking treatment utilizes a modified vaccinia virus to target and destroy cancer cells in pet animals. By leveraging the virus's inherent ability to replicate and infect cancer cells while sparing healthy tissues, this therapy offers a novel approach to combat various types of pet cancers.

Key Questions Answered in This Report

1. What was the size of the global pet cancer therapeutics market in 2023?
2. What is the expected growth rate of the global pet cancer therapeutics market during 2024-2032?
3. What are the key factors driving the global pet cancer therapeutics market?
4. What has been the impact of COVID-19 on the global pet cancer therapeutics market?
5. What is the breakup of the global pet cancer therapeutics market based on the therapy?

6. What is the breakup of the global pet cancer therapeutics market based on the animal species?
7. What is the breakup of the global pet cancer therapeutics market based on cancer type?
8. What is the breakup of the global pet cancer therapeutics market based on the end user?
9. What are the key regions in the global pet cancer therapeutics market?
10. Who are the key players/companies in the global pet cancer therapeutics market?

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