

Companion Animal Cancer Screening Market Forecasts to 2034 – Global Analysis By Test Type (Liquid Biopsy, Tissue Biopsy, Genomic Testing, Biomarker Tests and Heat Diffusion Imaging), Cancer Type, Technology, End User and By Geography

<https://marketpublishers.com/r/C4DAB5355236EN.html>

Date: July 2026

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: C4DAB5355236EN

Abstracts

According to Statistics MRC, the Global Companion Animal Cancer Screening Market is accounted for \$0.6 billion in 2026 and is expected to reach \$1.6 billion by 2034 growing at a CAGR of 13.0% during the forecast period. Companion Animal Cancer Screening refers to the systematic use of diagnostic tests and assessment methods to detect cancer or precancerous conditions in pets, primarily dogs and cats, before clinical symptoms become evident. It involves evaluating biological samples, imaging results, genetic markers, or other health indicators to identify the presence, risk, or early development of malignant diseases. The objective of companion animal cancer screening is to enable earlier diagnosis, support timely therapeutic intervention, and improve overall health outcomes and quality of life.

Market Dynamics:

Driver:

Rising companion animal cancer prevalence

The increasing incidence of cancer in companion animals, particularly dogs and cats, is driving sustained demand for advanced screening technologies in veterinary oncology. Epidemiological studies estimate that one in four dogs will develop a neoplastic condition during their lifetime, establishing a substantial and recurring testing population. Advances in veterinary medicine that extend companion animal lifespans

have expanded the proportion of aging animals susceptible to oncological conditions. Owner awareness campaigns by veterinary associations are normalizing routine cancer screening as a preventive care component, expanding testing frequency beyond symptomatic presentations.

Restraint:

Limited reimbursement frameworks

The absence of standardized reimbursement frameworks for companion animal cancer screening within pet insurance policies significantly constrains testing adoption rates. Most pet insurance plans categorize advanced oncology diagnostics as elective procedures, limiting reimbursement eligibility. Out-of-pocket costs for comprehensive genomic or liquid biopsy panels range from several hundred to several thousand dollars, creating price sensitivity barriers among cost-conscious pet owners. Veterinary practitioners face client resistance when recommending screening tests for asymptomatic animals where immediate clinical benefit is non-obvious. Establishing cost-effectiveness evidence is a prerequisite for broader insurance coverage inclusion.

Opportunity:

Liquid biopsy commercialization

The commercial launch of veterinary liquid biopsy platforms represents a transformative opportunity for companion animal cancer screening adoption. Blood-based circulating tumor DNA tests eliminate the need for invasive tissue sampling, significantly reducing procedure-related barriers for both practitioners and pet owners. PetDx's OncoK9 platform has demonstrated proof-of-concept for multi-cancer early detection in dogs through a single blood draw. Declining sequencing costs and improving bioinformatic analysis tools are expanding the sensitivity and specificity of circulating DNA detection panels. First-mover positioning in veterinary liquid biopsy generates a sustainable competitive advantage in a nascent but rapidly commercializing segment.

Threat:

Regulatory pathway uncertainties

The evolving regulatory landscape for companion animal in vitro diagnostic devices introduces commercialization risk for cancer screening test developers. The United

States Food and Drug Administration and international regulatory bodies have not yet established clear approval pathways specifically for veterinary companion animal cancer screening assays. Absence of standardized analytical validation requirements creates uncertainty for manufacturers seeking regulated market access. Competing platforms with divergent validation methodologies complicate comparative evidence generation. Regulatory delays can extend time-to-market by multiple years, constraining return on research and development investment for early-stage diagnostic companies.

Covid-19 Impact:

The COVID-19 pandemic disrupted veterinary oncology services as clinics prioritized urgent care and reduced elective diagnostic procedures during lockdown periods. Laboratory supply chains for specialized molecular diagnostic reagents experienced material shortages. However, pandemic-period pet adoption surges permanently enlarged the companion animal population, expanding the long-term testing addressable base. Post-pandemic recovery accelerated veterinary visit frequency backlogs, generating deferred diagnostic demand. Increased owner emotional investment in pandemic-era pets has structurally raised willingness to invest in advanced preventive screening.

The liquid biopsy segment is expected to be the largest during the forecast period

The liquid biopsy segment is expected to account for the largest market share during the forecast period, due to its non-invasive sampling requirements and capacity for multi-cancer early detection from a single blood draw. Liquid biopsy platforms are gaining rapid adoption among veterinary oncologists as a first-line screening tool that avoids the anesthetic and procedural risks associated with tissue sampling. The ability to detect circulating tumor DNA before clinical signs manifest aligns with preventive care frameworks increasingly advocated by veterinary professional bodies. Commercial platforms from PetDx and VolitionRx Limited are establishing clinical validity databases that accelerate institutional adoption.

The lymphoma segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the lymphoma segment is predicted to witness the highest growth rate, driven by the increasing prevalence of lymphoma among dogs and cats and the growing emphasis on early cancer detection. Rising awareness among pet owners regarding cancer symptoms and preventive healthcare is supporting greater

adoption of screening tests. Advances in liquid biopsy technologies, molecular diagnostics, and veterinary oncology are enhancing diagnostic accuracy. Additionally, increasing veterinary visits and expanding access to specialized cancer care services are expected to accelerate growth in this segment.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, due to the highest concentration of veterinary oncology specialists, advanced diagnostic laboratory infrastructure, and the most commercially mature pet insurance market globally. The United States hosts pioneering liquid biopsy and genomic testing companies including PetDx, OncoK9, and Antech Diagnostics. Institutional investment from academic veterinary schools drives clinical validation study activity. Strong owner willingness to invest in comprehensive cancer care for companion animals sustains premium diagnostic adoption.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, due to rapidly expanding veterinary oncology infrastructure in Japan, South Korea, Australia, and China and rising owner awareness of preventive cancer screening in aging pet populations. Government-funded veterinary research initiatives in Japan and South Korea incorporate companion animal oncology biomarker programs. Growing pet insurance penetration in Australia and Japan improves reimbursement pathways for advanced diagnostic testing. The region's expanding network of specialty veterinary hospitals is creating institutional demand for reference laboratory cancer screening services.

Key players in the market

Some of the key players in Companion Animal Cancer Screening Market include IDEXX Laboratories Inc., Zoetis Inc., PetDx, VolitionRx Limited, OncoK9, HT VET, Antech Diagnostics, Heska Corporation, Mars Petcare, Thermo Fisher Scientific Inc., BioMérieux SA, Neogen Corporation, Randox Laboratories Ltd., Labcorp, QIAGEN N.V., and Danaher Corporation.

Key Developments:

In June 2026, IDEXX Laboratories Inc. launched an expanded companion animal multi-

cancer early detection panel incorporating circulating tumor DNA analysis across 14 cancer types, available through its global reference laboratory network with 72-hour reporting turnaround.

In May 2026, PetDx published peer-reviewed clinical validation data demonstrating 85 percent sensitivity for early-stage lymphoma detection in dogs using its OncoK9 liquid biopsy platform, significantly advancing evidence for routine preventive screening adoption.

In March 2026, Zoetis Inc. announced a strategic collaboration with a leading academic veterinary oncology center to co-develop a feline cancer genomic biomarker panel targeting mammary tumors and lymphoma for commercial launch in 2027.

Test Types Covered:

Liquid Biopsy

Tissue Biopsy

Genomic Testing

Biomarker Tests

Heat Diffusion Imaging

Cancer Types Covered:

Lymphoma

Mast Cell Tumors

Osteosarcoma

Hemangiosarcoma

Dermal and Subcutaneous Masses

Mammary Tumors

Technologies Covered:

Next-Generation Sequencing

Polymerase Chain Reaction

Immunohistochemistry

Flow Cytometry

In Situ Hybridization

AI-Based Image Analysis

End Users Covered:

Veterinary Hospitals

Veterinary Clinics

Diagnostic Laboratories

Academic and Research Institutes

Pet Owners

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

Contents

1 EXECUTIVE SUMMARY

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

2 RESEARCH FRAMEWORK

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
 - 2.4.1 Data Collection (Primary and Secondary)
 - 2.4.2 Data Modeling and Estimation Techniques
 - 2.4.3 Data Validation and Triangulation
 - 2.4.4 Analytical and Forecasting Approach

3 MARKET DYNAMICS AND TREND ANALYSIS

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

4 COMPETITIVE AND STRATEGIC ASSESSMENT

- 4.1 Porter's Five Forces Analysis
 - 4.1.1 Supplier Bargaining Power
 - 4.1.2 Buyer Bargaining Power
 - 4.1.3 Threat of Substitutes
 - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

5 GLOBAL COMPANION ANIMAL CANCER SCREENING MARKET, BY TEST TYPE

- 5.1 Liquid Biopsy
- 5.2 Tissue Biopsy
- 5.3 Genomic Testing
- 5.4 Biomarker Tests
- 5.5 Heat Diffusion Imaging

6 GLOBAL COMPANION ANIMAL CANCER SCREENING MARKET, BY CANCER TYPE

- 6.1 Lymphoma
- 6.2 Mast Cell Tumors
- 6.3 Osteosarcoma
- 6.4 Hemangiosarcoma
- 6.5 Dermal and Subcutaneous Masses
- 6.6 Mammary Tumors

7 GLOBAL COMPANION ANIMAL CANCER SCREENING MARKET, BY TECHNOLOGY

- 7.1 Next-Generation Sequencing
- 7.2 Polymerase Chain Reaction
- 7.3 Immunohistochemistry
- 7.4 Flow Cytometry
- 7.5 In Situ Hybridization
- 7.6 AI-Based Image Analysis

8 GLOBAL COMPANION ANIMAL CANCER SCREENING MARKET, BY END USER

- 8.1 Veterinary Hospitals
- 8.2 Veterinary Clinics
- 8.3 Diagnostic Laboratories
- 8.4 Academic and Research Institutes
- 8.5 Pet Owners

9 GLOBAL COMPANION ANIMAL CANCER SCREENING MARKET, BY GEOGRAPHY

9.1 North America

9.1.1 United States

9.1.2 Canada

9.1.3 Mexico

9.2 Europe

9.2.1 United Kingdom

9.2.2 Germany

9.2.3 France

9.2.4 Italy

9.2.5 Spain

9.2.6 Netherlands

9.2.7 Belgium

9.2.8 Sweden

9.2.9 Switzerland

9.2.10 Poland

9.2.11 Rest of Europe

9.3 Asia Pacific

9.3.1 China

9.3.2 Japan

9.3.3 India

9.3.4 South Korea

9.3.5 Australia

9.3.6 Indonesia

9.3.7 Thailand

9.3.8 Malaysia

9.3.9 Singapore

9.3.10 Vietnam

9.3.11 Rest of Asia Pacific

9.4 South America

9.4.1 Brazil

9.4.2 Argentina

9.4.3 Colombia

9.4.4 Chile

9.4.5 Peru

9.4.6 Rest of South America

9.5 Rest of the World (RoW)

9.5.1 Middle East

9.5.1.1 Saudi Arabia

9.5.1.2 United Arab Emirates

9.5.1.3 Qatar

9.5.1.4 Israel

9.5.1.5 Rest of Middle East

9.5.2 Africa

9.5.2.1 South Africa

9.5.2.2 Egypt

9.5.2.3 Morocco

9.5.2.4 Rest of Africa

10 STRATEGIC MARKET INTELLIGENCE

10.1 Industry Value Network and Supply Chain Assessment

10.2 White-Space and Opportunity Mapping

10.3 Product Evolution and Market Life Cycle Analysis

10.4 Channel, Distributor, and Go-to-Market Assessment

11 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES

11.1 Mergers and Acquisitions

11.2 Partnerships, Alliances, and Joint Ventures

11.3 New Product Launches and Certifications

11.4 Capacity Expansion and Investments

11.5 Other Strategic Initiatives

12 COMPANY PROFILES

12.1 IDEXX Laboratories Inc.

12.2 Zoetis Inc.

12.3 PetDx

12.4 VolitionRx Limited

12.5 OncoK9

12.6 HT VET

12.7 Antech Diagnostics

12.8 Heska Corporation

12.9 Mars Petcare

12.10 Thermo Fisher Scientific Inc.

12.11 BioMérieux SA

12.12 Neogen Corporation

12.13 Randox Laboratories Ltd.

12.14 Labcorp

12.15 QIAGEN N.V.

12.16 Danaher Corporation

List Of Tables

LIST OF TABLES

Table 1 Global Companion Animal Cancer Screening Market Outlook, By Region (2023-2034) (\$MN)

Table 2 Global Companion Animal Cancer Screening Market Outlook, By Test Type (2023-2034) (\$MN)

Table 3 Global Companion Animal Cancer Screening Market Outlook, By Liquid Biopsy (2023-2034) (\$MN)

Table 4 Global Companion Animal Cancer Screening Market Outlook, By Tissue Biopsy (2023-2034) (\$MN)

Table 5 Global Companion Animal Cancer Screening Market Outlook, By Genomic Testing (2023-2034) (\$MN)

Table 6 Global Companion Animal Cancer Screening Market Outlook, By Biomarker Tests (2023-2034) (\$MN)

Table 7 Global Companion Animal Cancer Screening Market Outlook, By Heat Diffusion Imaging (2023-2034) (\$MN)

Table 8 Global Companion Animal Cancer Screening Market Outlook, By Cancer Type (2023-2034) (\$MN)

Table 9 Global Companion Animal Cancer Screening Market Outlook, By Lymphoma (2023-2034) (\$MN)

Table 10 Global Companion Animal Cancer Screening Market Outlook, By Mast Cell Tumors (2023-2034) (\$MN)

Table 11 Global Companion Animal Cancer Screening Market Outlook, By Osteosarcoma (2023-2034) (\$MN)

Table 12 Global Companion Animal Cancer Screening Market Outlook, By Hemangiosarcoma (2023-2034) (\$MN)

Table 13 Global Companion Animal Cancer Screening Market Outlook, By Dermal and Subcutaneous Masses (2023-2034) (\$MN)

Table 14 Global Companion Animal Cancer Screening Market Outlook, By Mammary Tumors (2023-2034) (\$MN)

Table 15 Global Companion Animal Cancer Screening Market Outlook, By Technology (2023-2034) (\$MN)

Table 16 Global Companion Animal Cancer Screening Market Outlook, By Next-Generation Sequencing (2023-2034) (\$MN)

Table 17 Global Companion Animal Cancer Screening Market Outlook, By Polymerase Chain Reaction (2023-2034) (\$MN)

Table 18 Global Companion Animal Cancer Screening Market Outlook, By

Immunohistochemistry (2023-2034) (\$MN)

Table 19 Global Companion Animal Cancer Screening Market Outlook, By Flow Cytometry (2023-2034) (\$MN)

Table 20 Global Companion Animal Cancer Screening Market Outlook, By In Situ Hybridization (2023-2034) (\$MN)

Table 21 Global Companion Animal Cancer Screening Market Outlook, By AI-Based Image Analysis (2023-2034) (\$MN)

Table 22 Global Companion Animal Cancer Screening Market Outlook, By End User (2023-2034) (\$MN)

Table 23 Global Companion Animal Cancer Screening Market Outlook, By Veterinary Hospitals (2023-2034) (\$MN)

Table 24 Global Companion Animal Cancer Screening Market Outlook, By Veterinary Clinics (2023-2034) (\$MN)

Table 25 Global Companion Animal Cancer Screening Market Outlook, By Diagnostic Laboratories (2023-2034) (\$MN)

Table 26 Global Companion Animal Cancer Screening Market Outlook, By Academic and Research Institutes (2023-2034) (\$MN)

Table 27 Global Companion Animal Cancer Screening Market Outlook, By Pet Owners (2023-2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

I would like to order

Product name: Companion Animal Cancer Screening Market Forecasts to 2034 – Global Analysis By Test Type (Liquid Biopsy, Tissue Biopsy, Genomic Testing, Biomarker Tests and Heat Diffusion Imaging), Cancer Type, Technology, End User and By Geography

Product link: <https://marketpublishers.com/r/C4DAB5355236EN.html>

Price: US\$ 4,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/C4DAB5355236EN.html>