

# **Pet Oncology Market Forecasts to 2034 – Global Analysis By Cancer Type (Lymphoma, Mast Cell Tumors, Melanoma, Squamous Cell Carcinoma, Mammary & Skin Tumors, and Other Cancer Types), Animal Type, Therapy Type, Diagnosis Type, End User, Distribution Channel, and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Pet Oncology Market is accounted for \$0.47 billion in 2026 and is expected to reach \$0.97 billion by 2034 growing at a CAGR of 9.3% during the forecast period. Pet oncology encompasses the diagnosis, treatment, and management of cancer in companion animals, primarily dogs and cats, as veterinary medicine increasingly mirrors human healthcare capabilities. The rising incidence of cancer in pets, driven by longer lifespans, improved diagnostics, and environmental factors, has elevated oncology to a critical specialty within veterinary practice. This market includes advanced diagnostic modalities, therapeutic interventions, and supportive care services delivered across specialized facilities, with pet owners demonstrating growing willingness to invest in comprehensive cancer care for their animal companions.

### **Market Dynamics:**

#### **Driver:**

Increasing pet humanization and owner willingness to spend on advanced care

Pet owners increasingly view their animal companions as family members, driving unprecedented demand for sophisticated medical treatments including cancer care.

This emotional bond translates into substantial financial commitments, with owners pursuing therapies such as chemotherapy, radiation, and advanced surgery that were once reserved exclusively for human patients. The availability of pet health insurance has further reduced economic barriers, enabling access to specialty oncology services. As disposable incomes rise across developed markets and the human-animal bond strengthens, veterinary practices report growing acceptance of aggressive cancer treatment protocols, fundamentally expanding the addressable market for pet oncology services worldwide.

**Restraint:**

High cost of cancer diagnostics and treatments

The substantial financial burden of comprehensive cancer care remains a significant barrier for many pet owners despite growing willingness to invest in animal health. Advanced imaging procedures, biopsy analysis, chemotherapy protocols, and radiation therapy can accumulate costs exceeding several thousand dollars, often exceeding typical pet insurance coverage limits. Unlike human healthcare systems, veterinary medicine lacks government subsidies or universal coverage, placing the entire financial responsibility directly on owners. This economic reality forces difficult decisions, with some owners opting for palliative care or euthanasia rather than pursuing potentially curative but expensive treatment pathways, limiting market penetration particularly in price-sensitive demographic segments.

**Opportunity:**

Advancements in comparative oncology and translational research

Growing collaboration between veterinary and human oncology research is creating significant opportunities for market expansion and scientific discovery. Naturally occurring cancers in companion animals provide valuable models for studying tumor biology and therapeutic responses, accelerating drug development while directly benefiting pet patients. Pharmaceutical companies increasingly include veterinary trials alongside human studies, recognizing the dual potential for animal health approvals and human data generation. This comparative approach reduces research costs and timelines while strengthening the evidence base for novel therapeutics. Veterinary oncology's integration into broader cancer research ecosystems attracts investment, talent, and technological innovation that collectively advance the specialty's capabilities and market appeal.

**Threat:****Shortage of board-certified veterinary oncologists**

A severe scarcity of specialized professionals poses a critical threat to market growth, limiting service availability despite rising demand. The extensive training pathway, requiring veterinary school completion followed by internship, residency, and board certification examinations, produces only a small number of new specialists annually. This workforce gap disproportionately affects rural and underserved regions where pet owners must travel substantial distances for oncology consultations. The imbalance between patient demand and specialist availability creates extended wait times, rushed appointments, and compromised continuity of care. Without significant expansion of training programs and innovative telemedicine solutions, this workforce constraint will continue constraining the market's ability to serve the growing cancer-afflicted pet population.

**Covid-19 Impact:**

The COVID-19 pandemic produced mixed effects on the pet oncology market, with initial disruptions followed by sustained acceleration of certain trends. Lockdowns temporarily reduced routine veterinary visits and delayed non-urgent cancer screenings, while also increasing pet adoptions and strengthening human-animal bonds. Telemedicine adoption surged, enabling remote consultations and follow-up care that expanded access to oncology expertise beyond geographic limitations. The pandemic's emphasis on health vulnerability heightened owner awareness of pet wellness, including cancer prevention and early detection. These behavioral shifts proved durable, with post-pandemic pet owners maintaining heightened vigilance about animal health and greater acceptance of technology-enabled care delivery models in oncology practice.

The Imaging segment is expected to be the largest during the forecast period

The Imaging segment is expected to account for the largest market share during the forecast period, reflecting the essential role of radiographic visualization in cancer diagnosis and staging. Advanced imaging modalities including computed tomography (CT), magnetic resonance imaging (MRI), ultrasound, and radiography provide critical information about tumor location, size, metastasis status, and anatomical relationships essential for treatment planning. Veterinary practices have increasingly invested in sophisticated imaging equipment as referral hospitals and specialty centers expand

their capabilities. The non-invasive nature of most imaging procedures, combined with their ability to guide biopsy procedures and monitor therapeutic response, ensures these diagnostic tools remain foundational to pet oncology practice throughout the forecast timeline.

The Specialty Cancer Centers segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Specialty Cancer Centers segment is predicted to witness the highest growth rate, driven by the increasing demand for comprehensive, multidisciplinary oncology care under one roof. These dedicated facilities offer integrated services including diagnostic imaging, biopsy, chemotherapy administration, radiation therapy, surgery, and palliative care, coordinated by specialized oncology teams. Pet owners increasingly prefer these centers for their advanced capabilities, clinical trial access, and continuity of care compared to general veterinary practices. The concentration of expensive equipment and specialized personnel in dedicated facilities improves operational efficiency and clinical outcomes. As private equity investment flows into veterinary specialty medicine and referral networks expand, these centers are proliferating across major metropolitan markets.

### **Region with largest share:**

During the forecast period, the North America region is expected to hold the largest market share, supported by high pet ownership rates, advanced veterinary infrastructure, and strong owner willingness to invest in specialty care. The region's mature pet insurance market reduces financial barriers, while extensive networks of referral hospitals and specialty centers ensure geographic coverage across urban and suburban areas. Leading veterinary schools and research institutions drive continuous innovation in oncology diagnostics and therapeutics. The cultural normalization of advanced pet cancer treatment, reinforced by media coverage of successful animal cancer cases, encourages owners to pursue aggressive treatment pathways. These structural advantages collectively sustain North America's dominant market position throughout the forecast period.

### **Region with highest CAGR:**

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, fueled by rapidly rising pet ownership, growing disposable incomes, and increasing Western influence on pet care attitudes. Countries including China, Japan,

and South Korea are witnessing fundamental shifts in human-animal relationships as urbanization reduces family sizes and more households welcome companion animals. The establishment of veterinary specialty hospitals in major cities, combined with expanding pet insurance availability, improves access to advanced oncology services. Government investments in veterinary infrastructure and rising numbers of trained specialists address historical workforce constraints. As awareness of pet cancer treatment options spreads through social media and international travel, Asia Pacific emerges as the fastest-growing market for pet oncology services.

### **Key players in the market**

Some of the key players in Pet Oncology Market include Zoetis Inc, Elanco Animal Health Incorporated, Virbac, Boehringer Ingelheim International GmbH, Dechra Pharmaceuticals PLC, VCA Inc, PetCure Oncology, Varian Medical Systems Inc, Accuray Incorporated, Elekta AB, Merck & Co Inc, Ceva Sant? Animale, Aratana Therapeutics Inc, Phibro Animal Health Corporation, and Heska Corporation.

### **Key Developments:**

In February 2026, PetCure Oncology announced the successful treatment of the first canine patient using the Sirius™ robotically accelerated platform at its Seattle location, marking the first use of human-grade PAWS-RT (Photon Augmented Wave Stereotactic Radiation Therapy) in the Pacific Northwest.

In January 2026, Zoetis launched a new AI-powered diagnostic module for its Vetscan Imagyst™ platform, specifically designed to help veterinarians identify cancerous cells in fine-needle aspirates with higher accuracy at the point of care.

In October 2025, Elanco received final regulatory approval for Befrena, a novel therapeutic aimed at managing specialty conditions in pets, strengthening its position in the high-margin therapeutic market.

### **Cancer Types Covered:**

Lymphoma

Mast Cell Tumors

Melanoma

Squamous Cell Carcinoma

Mammary & Skin Tumors

Other Cancer Types

Animal Types Covered:

Dogs

Cats

Other Companion Animals

Therapy Types Covered:

Chemotherapy

Radiation Therapy

Immunotherapy

Targeted Therapy

Surgery

Combination Therapy

Diagnostic Types Covered:

Biopsy

Imaging

Blood Tests

Molecular Diagnostics

Other Diagnostic Methods

End Users Covered:

Veterinary Hospitals & Clinics

Specialty Cancer Centers

Academic & Research Institutes

Distribution Channels Covered:

Veterinary Pharmacies

Online Pharmacies

Retail Pharmacies

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

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