

Veterinary Oncology Market Forecasts to 2034 – Global Analysis By Animal Type (Dogs, Cats, Horses, and Other Companion Animals), Cancer Type, Diagnosis, Treatment Type, Route of Administration, Therapy, End User, Distribution Channel, and By Geography

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Abstracts

According to Statistics MRC, the Global Veterinary Oncology Market is accounted for \$1.9 billion in 2026 and is expected to reach \$5.1 billion by 2034 growing at a CAGR of 12.6% during the forecast period. Veterinary oncology is a specialized branch of veterinary medicine focused on the diagnosis, treatment, and management of cancer in animals. The market encompasses diagnostic methods including imaging (X-ray, ultrasound, CT, MRI, PET), biopsy and histopathology, cytology, molecular diagnostics, immunohistochemistry, laboratory tests, and other diagnostic approaches. Treatment modalities include chemotherapy, surgery, radiation therapy, immunotherapy, targeted therapy, combination therapy, and palliative care. Growing pet ownership, increasing prevalence of cancer in aging animal populations, rising demand for advanced veterinary care, and technological advancements in diagnostic and treatment modalities are key drivers of market expansion across all regions.

Market Dynamics:

Driver:

Increasing pet ownership and aging animal populations

The rising global pet population and the growing number of aging animals susceptible to

cancer are primary drivers for the veterinary oncology market. As veterinary care advances and pets live longer, the incidence of cancer in companion animals is increasing. Pet owners are increasingly seeking specialized oncology services to extend their pets' lives and improve quality of life. The humanization of pets has led to greater willingness to invest in advanced cancer diagnostics and treatments comparable to human healthcare. As awareness of veterinary oncology options expands and pet owners prioritize comprehensive care, demand for cancer diagnosis and treatment services continues growing across all regions.

Restraint:

High treatment costs and limited insurance coverage

The significant costs associated with veterinary oncology diagnosis and treatment and limited pet insurance coverage represent a major restraint for the market. Cancer treatment including surgery, chemotherapy, and radiation therapy can be prohibitively expensive for many pet owners. Limited pet insurance penetration in many regions leaves owners responsible for substantial out-of-pocket expenses. Veterinary practices may require significant investment in oncology equipment and specialized staff, affecting service availability. These cost barriers may limit access to advanced oncology care, particularly for lower-income pet owners and in developing regions with limited insurance options.

Opportunity:

Advancements in diagnostic imaging and molecular diagnostics

Continuous innovation in diagnostic imaging and molecular diagnostic technologies presents significant opportunities for veterinary oncology market expansion. Advanced imaging including CT, MRI, and PET enables precise tumor localization, staging, and treatment planning. Molecular diagnostics including genetic testing and liquid biopsies enable early detection and personalized treatment approaches. Immunohistochemistry enables tumor characterization for targeted therapy selection. Integration of AI in diagnostic imaging enhances interpretation accuracy. As diagnostic technologies become more accessible and affordable, early detection and precise treatment planning capture growing market share, enabling improved outcomes.

Threat:

Shortage of veterinary oncologists and specialists

The limited availability of board-certified veterinary oncologists and trained support staff poses significant threats to the veterinary oncology market. Veterinary oncology requires specialized training beyond general veterinary education. The shortage of specialists restricts service availability, particularly in underserved areas and smaller practices. Limited training programs may constrain workforce growth. Veterinary practices may struggle to recruit qualified oncologists to staff oncology services. This workforce shortage may limit service expansion and patient access, potentially affecting market growth and patient outcomes.

Covid-19 Impact:

The COVID-19 pandemic had a significant impact on the veterinary oncology market. Initial disruptions included reduced veterinary visits during lockdowns, with many oncology appointments postponed. Supply chain interruptions affected diagnostic and treatment supplies. However, pet adoption surged during the pandemic, expanding the pet population and creating new patients. Telemedicine enabled remote consultations and follow-up care. Pet owners prioritized pet health during the crisis. Post-pandemic, elevated pet ownership and continued focus on pet health have sustained demand for veterinary oncology services, with practices resuming and expanding oncology offerings.

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, driven by the essential role of diagnostic imaging in cancer detection, staging, treatment planning, and monitoring across all oncology cases. Imaging modalities including X-ray, ultrasound, CT, MRI, and PET are fundamental to veterinary oncology practice. The segment benefits from established technology adoption, continuous innovation, and expanding availability across practice types. Imaging is often the first diagnostic step in suspected cancer cases and is essential for evaluating treatment response. With essential diagnostic role and broad adoption across practice settings, imaging maintains the largest diagnostic segment share throughout the forecast period.

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

Over the forecast period, the Combination Therapy segment is predicted to witness the highest growth rate, fueled by growing evidence of superior outcomes from multimodal treatment approaches and increasing adoption of integrated oncology protocols combining surgery, chemotherapy, radiation, and immunotherapy. Combination therapy offers improved survival rates and quality of life compared to single-modality treatment. The segment benefits from advances in understanding cancer biology and treatment interactions. Growing veterinary specialty centers offering comprehensive oncology services drive adoption. As treatment protocols evolve and integrated care becomes standard, combination therapy delivers the fastest treatment segment growth.

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, strong spending on veterinary care, and advanced veterinary oncology infrastructure. The United States leads regional market growth with substantial investment in specialty veterinary services. Availability of board-certified veterinary oncologists and advanced treatment facilities supports service provision. High awareness of oncology treatment options among pet owners drives demand. Established pet insurance and financing options enable treatment access. With high pet spending and advanced oncology infrastructure, North America maintains its dominant market position.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by rising pet ownership, increasing disposable incomes, and growing awareness of advanced veterinary oncology services across countries including China, India, Japan, and Australia. The region's rapidly growing pet population and expanding middle class create substantial demand for veterinary specialty services. Veterinary practice modernization and technology adoption are accelerating. Increasing investment in veterinary education and specialist training expands oncology capacity. Growing awareness of cancer treatment options among pet owners drives demand. As veterinary healthcare develops, Asia Pacific delivers the fastest veterinary oncology market growth globally.

Key players in the market

Some of the key players in Veterinary Oncology Market include Zoetis Inc., Elanco Animal Health Incorporated, Merck Animal Health, Boehringer Ingelheim Animal Health,

Virbac S.A., Dechra Pharmaceuticals PLC, IDEXX Laboratories, Inc., Antech Diagnostics, Inc., VolitionRx Limited, Torigen Pharmaceuticals Inc., PetCure Oncology, Varian Medical Systems, Inc., Accuray Incorporated, FidoCure (One Health Company), ImpriMed, Inc., and Regeneus Ltd.

Key Developments:

In March 2026, Torigen Pharmaceuticals detailed the regulatory evolution of its point-of-care autologous cancer vaccine, VimClara, moving to a 9 CFR 107.1 in-clinic preparation kit classification that allows veterinarians to create personalized immunotherapies from excised tumor tissue in roughly 40 minutes.

In February 2026, Zoetis completed the acquisition of Veterinary Pathology Group (VPG) to expand its multi-specialty diagnostic services, enhancing specialized oncology pathology support and fast-turnaround diagnostic insights for veterinary practices.

In January 2026, VolitionRx announced breakthrough clinical results for its Nu.Q® Vet Feline assay, demonstrating over 80% sensitivity at 100% specificity for detecting feline lymphoma, paving the way for the world's first blood-based liquid biopsy test for cat cancer.

In September 2025, IDEXX Laboratories presented clinical data at the Veterinary Cancer Society Annual Conference highlighting its IDEXX Cancer Dx™ blood test, which detected circulating biomarkers for canine lymphoma up to 6 to 8 months prior to the onset of clinical signs.

Animal Types Covered:

Dogs

Cats

Horses

Other Companion Animals

Cancer Types Covered:

Lymphoma

Mast Cell Cancer

Osteosarcoma

Mammary Gland Tumors

Melanoma

Soft Tissue Sarcoma

Hemangiosarcoma

Squamous Cell Carcinoma

Transitional Cell Carcinoma

Other Cancer Types

Diagnosis Types Covered:

Imaging

Biopsy and Histopathology

Cytology

Molecular Diagnostics

Immunohistochemistry

Laboratory Tests

Other Diagnostic Methods

Treatment Types Covered:

Chemotherapy

Surgery

Radiation Therapy

Immunotherapy

Targeted Therapy

Combination Therapy

Palliative Care

Routes of Administration Covered:

Oral

Injectable

Topical

Therapies Covered:

Drug Therapy

Surgical Oncology

Radiation Oncology

Precision Oncology

End Users Covered:

Veterinary Hospitals

Veterinary Clinics

Veterinary Diagnostic Laboratories

Veterinary Academic and Research Institutes

Distribution Channels Covered:

Hospital Pharmacies

Retail Pharmacies

Online Pharmacies

Direct Sales

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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