

United States Veterinary Oncology Diagnostics Market By Animal Type (Canine, Feline, Others), By Test Type (Blood Tests, Biopsy, Genome Testing, Endoscopy, Urinalysis, Imaging), By Cancer Type (Lymphoma, Sarcomas, Mammary Gland Tumors, Skin Cancers, Others), By End User (Reference Laboratories, Veterinary Hospitals and Clinics, Others), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Market Overview

The United States Veterinary Oncology Diagnostics Market, valued at USD 985.24 million in 2024, is projected to reach USD 1,607.87 million by 2030, growing at a CAGR of 8.48%. This growth is driven by increasing awareness among pet owners about early cancer detection and the importance of proactive health screenings, especially for older animals or those predisposed to cancer. With rising demand, advanced technologies like molecular diagnostics, imaging, and biomarker testing are increasingly being adopted to facilitate early and accurate diagnoses. Moreover, personalized cancer treatments and minimally invasive diagnostic procedures are gaining traction, supported by emerging AI-based diagnostic systems that promise faster, more precise results and enhance treatment outcomes.

Key Market Drivers

Rising Prevalence of Cancer in Pets

The increasing incidence of cancer among pets is a primary driver of the United States Veterinary Oncology Diagnostics Market. Data shows that 1 in 4 dogs develop neoplasia during their lifetime, with almost half of dogs over ten diagnosed with cancer. In 2023 alone, approximately 4.2 million dogs in the U.S. were diagnosed, equating to about 53 cases per 1,000 dogs annually. This significant prevalence has amplified the demand for precise and early diagnostic tools. Veterinarians now rely on advanced technologies—such as molecular diagnostics, imaging tools, and blood tests—to detect cancer in its earliest stages, often before clinical symptoms arise. This enables timely interventions, improving treatment success. The growing awareness has also led to routine cancer screenings becoming a norm in veterinary visits. Specialized oncology clinics and state-of-the-art diagnostic services further bolster the market's expansion. As both pet owners and veterinary professionals increasingly prioritize cancer detection, the demand for oncology diagnostics is expected to remain strong throughout the forecast period.

Key Market Challenges

Limited Access to Specialized Veterinary Oncologists

One of the main hurdles in the United States Veterinary Oncology Diagnostics Market is the limited availability of specialized veterinary oncologists. While metropolitan areas often have access to such professionals, rural regions face a critical shortage, resulting in delayed diagnosis and treatment. The inconvenience and cost of traveling to distant clinics discourage many pet owners from seeking specialized care, leading to missed opportunities for early intervention. The small number of trained oncologists has created bottlenecks, particularly as awareness of pet cancer rises and more diagnostics are sought. This shortage also impacts the adoption of advanced technologies, as clinics lacking oncology specialists may deprioritize investment in cutting-edge tools. Until broader access to specialized professionals is achieved, the market may face constraints that hinder treatment efficacy and the expansion of diagnostic capabilities.

Key Market Trends

Shift Toward Non-Invasive Diagnostics

There is a growing preference in the United States Veterinary Oncology Diagnostics Market for non-invasive diagnostic methods due to their reduced physical burden and improved comfort for pets. Traditional methods like biopsies are being replaced or supplemented by options such as blood tests, liquid biopsies, MRIs, and ultrasounds,

which provide accurate results with minimal discomfort. Liquid biopsies, for instance, can detect cancer-related biomarkers in blood, facilitating early detection without surgery. This trend is supported by advancements in high-resolution imaging and molecular diagnostics, which improve accuracy and speed. Pet owners and veterinarians increasingly favor these methods for their convenience, safety, and potential to monitor disease progression with ease, contributing to their growing adoption and market expansion.

Key Market Players

Zoetis Inc.

Neogen Corporation

Antech Diagnostics, Inc.

IDEXX Laboratories, Inc.

Embark Veterinary, Inc.

Boehringer Ingelheim Animal Health USA Inc.

Arizona Veterinary Oncology

Varian Medical Systems, Inc.

Merck & Co., Inc.

Oncotect, Inc.

Report Scope:

In this report, the United States Veterinary Oncology Diagnostics Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

United States Veterinary Oncology Diagnostics Market, By Animal Type:

Canine

Feline

Others

United States Veterinary Oncology Diagnostics Market, By Test Type:

Blood Tests

Biopsy

Genome testing

Endoscopy

Urinalysis

Imaging

United States Veterinary Oncology Diagnostics Market, By Cancer Type:

Lymphoma

Sarcomas

Mammary Gland Tumors

Skin Cancers

Others

United States Veterinary Oncology Diagnostics Market, By End User:

Reference Laboratories

Veterinary Hospitals and Clinics

Others

United States Veterinary Oncology Diagnostics Market, By Region:

North-East

Mid-West

West

South

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United States Veterinary Oncology Diagnostics Market.

Available Customizations:

United States Veterinary Oncology Diagnostics Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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