

# **United States Veterinary Oncology Market By Animal Type (Canine, Feline, Equine), By Therapy (Radiotherapy, Surgery, Chemotherapy, Immunotherapy and Other Therapies), By Cancer Type (Skin Cancers, Lymphomas, Sarcomas and Others), By Region, Competition, Forecast & Opportunities, 2019-2029F**

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## **Abstracts**

United States Veterinary Oncology Market was valued at USD 450.63 Million in 2023 and is expected to reach USD 644.03 Million by 2029 with a CAGR of 6.09% during the forecast period. The United States veterinary oncology market is driven by several key factors. Increasing pet ownership and a growing focus on pet health and well-being have heightened demand for specialized veterinary care, including oncology services. Advances in diagnostic and treatment technologies, such as improved imaging techniques and novel cancer therapies, are enhancing the effectiveness of cancer care for pets, leading to better outcomes and higher survival rates. Rising awareness among pet owners about cancer prevention and early detection is encouraging more individuals to seek veterinary oncology services. The aging pet population further contributes to market growth, as older animals are more susceptible to cancer. The expansion of veterinary practices and specialty clinics dedicated to oncology is making these services more accessible, reinforcing the overall growth of the United States Veterinary Oncology Market.

### **Key Market Drivers**

Increasing Pet Ownership

The rise in pet ownership in the United States is a significant driver of the United States Veterinary Oncology Market. With nearly 70% of American households now owning a pet, the sheer volume of animals requiring medical care has increased dramatically. This surge in pet adoption reflects broader societal trends where pets are increasingly regarded not just as companions but as integral members of the family. As a result, pet owners are more invested in their animals' health and well-being, leading to a heightened demand for veterinary services, particularly specialized oncology care. The 2024 APPA National Pet Owners Survey, referenced in APPA's State of the Industry Report, reveals that 82 million households in the U.S. own a pet.

This evolving perspective has transformed how pet owners approach healthcare for their animals. Owners are now more likely to prioritize regular check-ups and screenings, particularly for conditions such as cancer that can be life-threatening if not detected early. Preventive healthcare has become a standard expectation, with many owners actively seeking out veterinarians who provide comprehensive wellness programs that include cancer screenings. This proactive approach not only helps in the early detection of potential health issues but also contributes to better overall health outcomes for pets. The increasing number of pets in the U.S. correlates with a growing market for veterinary oncology products and services. As more households adopt pets, the total pet population rises, which inevitably leads to a higher incidence of age-related diseases, including cancer. Older pets, who are more prone to various forms of malignancies, necessitate specialized care, thereby expanding the market for veterinary oncology.

### Rising Awareness of Pet Health

Growing awareness among pet owners regarding the importance of pet health and wellness is a significant factor fueling the United States Veterinary Oncology Market. In recent years, there has been a noticeable shift in how pet owners perceive their pets' health, driven largely by educational campaigns and improved access to information through digital platforms. These resources have empowered pet owners to better recognize the early signs of health issues, including cancer, and to seek timely veterinary care. As information about pet health becomes more readily available through social media, blogs, and dedicated veterinary websites, pet owners are increasingly educated about the various conditions that can affect their animals. This surge in accessible information has created a more informed public that understands not only the symptoms of cancer but also the importance of regular check-ups and screenings for early detection. Many owners now recognize that early intervention can lead to significantly better outcomes for their pets, including increased survival rates and

improved quality of life.

This heightened awareness has led to a substantial increase in routine veterinary visits. Pet owners who may have previously only sought care in emergencies are now scheduling regular check-ups, understanding that preventative care is vital. These visits often include discussions about cancer risks, particularly in older pets or breeds predisposed to certain types of cancer. As a result, veterinarians are better positioned to detect potential issues early, facilitating prompt intervention that can dramatically alter the course of treatment. This increased focus on health awareness encourages pet owners to consider advanced treatment options when their pets are diagnosed with cancer. Once faced with a cancer diagnosis, informed pet owners are more likely to explore all available avenues, including specialized veterinary oncology services. They are increasingly willing to invest in advanced diagnostic tools and therapies that were previously overlooked or considered too expensive. This willingness not only benefits the pets but also propels the growth of the United States Veterinary Oncology Market as a whole.

### Expansion of Veterinary Practices and Specialty Clinics

The growth of veterinary practices and specialty clinics dedicated to oncology is significantly impacting the United States Veterinary Oncology Market. As awareness of pet health issues rises and the demand for specialized care increases, veterinary professionals are increasingly pursuing training in oncology. This trend has led to a proliferation of specialty clinics that focus exclusively on cancer treatment for pets, providing a much-needed resource for pet owners seeking advanced care options. These specialty clinics are equipped with advanced diagnostic tools and treatment modalities that general veterinary practices may not have the capability to offer. For example, many oncology clinics utilize cutting-edge imaging technologies, such as MRI and CT scans, to accurately diagnose tumors and determine the best course of treatment. They often provide access to specialized therapies, including chemotherapy, immunotherapy, and targeted therapies, that are essential for effectively managing cancer in pets. The availability of such advanced resources not only improves diagnostic accuracy and treatment efficacy but also enhances the overall quality of care that pets receive. In December 2023, Online pet supply retailer Chewy announced it plans to open veterinary clinics in 2024. The company will launch several practices under the brand name “Chewy Vet Care,” with the first location set to open in South Florida early next year. These clinics will provide a range of services, including routine appointments, urgent care, and surgical procedures. Current listings on the Chewy Vet Care website indicate job openings for veterinarians, veterinary technicians, and

support staff in Plantation, Florida—where the company is based—and in Denver. The clinics will utilize Chewy's online platform, which integrates with the Chewy Vet Care website and third-party partner practices.

The presence of specialized clinics significantly enhances accessibility for pet owners. In the past, owners may have had to travel long distances to seek specialized oncology care, which could deter them from pursuing the treatment their pets needed. However, the rise of local specialty clinics means that many pet owners can access targeted oncology services within a reasonable distance from their homes. This increased accessibility encourages more pet owners to seek out the care their animals need, ultimately contributing to earlier diagnoses and better treatment outcomes. As the number of specialty clinics expands, competition within the United States Veterinary Oncology Market is likely to increase. This heightened competition can lead to improvements in service quality, as clinics strive to differentiate themselves by offering the best possible care. Innovations may emerge in treatment protocols, customer service, and overall patient experience. Clinics may also collaborate on research and share best practices, further enhancing the quality of care provided across the board.

### Government and Nonprofit Initiatives

Government and nonprofit organizations play a crucial role in promoting veterinary oncology through funding, education, and awareness initiatives. Grants and funding for research in veterinary medicine contribute to advancements in treatment and care for pets with cancer. Educational campaigns aimed at both veterinarians and pet owners help raise awareness about the importance of early detection and treatment of cancer in pets. Organizations dedicated to veterinary oncology often provide resources and support for pet owners facing cancer diagnoses, fostering a community focused on improving pet health outcomes. These initiatives not only enhance the visibility of veterinary oncology but also encourage a culture of proactive pet healthcare, ultimately driving the growth of the market. By raising awareness and providing support, these organizations help ensure that pets receive the timely and effective care they need, reinforcing the overall demand for veterinary oncology services.

### Key Market Challenges

#### High Cost of Treatments

One of the most significant challenges in the United States Veterinary Oncology Market is the high cost of treatments. Advanced therapies, including chemotherapy, radiation,

and surgical interventions, can be prohibitively expensive for many pet owners. The financial burden can deter them from seeking necessary care for their pets, particularly when they face significant costs associated with diagnostic procedures and ongoing treatments. This financial barrier is further compounded by the fact that many pet insurance plans do not cover specialized oncology services or have limitations on coverage. As a result, pet owners often find themselves in a difficult position, having to weigh the quality of care against their financial situation. The perception that veterinary oncology is too expensive can lead to delays in treatment or, in some cases, the decision to forego care altogether. This not only impacts the health outcomes for pets but also contributes to the overall stagnation of the United States Veterinary Oncology Market, as potential clients opt out of specialized care. Addressing these cost challenges requires a multi-faceted approach, including more affordable treatment options, better insurance coverage for oncology services, and increased public awareness about the importance of pet health investments.

### Limited Research Funding

Limited research funding is another major challenge hindering the advancement of veterinary oncology. While there has been an increase in interest in this field, funding for research studies, clinical trials, and innovative treatment development often falls short. This lack of financial support can limit the scope and scale of research initiatives, slowing the discovery of new therapies and treatment protocols. Veterinary oncology does not attract the same level of investment as human oncology, leading to fewer resources for studying cancer biology in pets and exploring novel treatment options. The disparity in funding can create a cycle where less research leads to fewer advancements, which in turn results in reduced interest from investors and funding bodies. To overcome this challenge, there needs to be greater collaboration between veterinary institutions, pharmaceutical companies, and research organizations to secure funding and drive forward initiatives that focus on improving cancer care for pets. Increased funding not only supports research but also fosters innovation, ultimately benefiting the United States Veterinary Oncology Market and the pets it serves.

### Key Market Trends

#### Advances in Diagnostic and Treatment Technologies

Technological advancements in veterinary medicine have significantly transformed the landscape of veterinary oncology, revolutionizing how veterinarians diagnose and treat cancer in pets. One of the most impactful innovations is the development of advanced

imaging techniques, such as MRI, CT scans, and ultrasound. These tools enable veterinarians to visualize internal structures with remarkable clarity, allowing for more accurate and early-stage diagnoses of cancer. For instance, MRI and CT scans can reveal the size, location, and extent of tumors, while ultrasound helps assess the involvement of surrounding tissues and organs. This early detection is crucial because it often allows for timely intervention, improving the chances of successful treatment and better overall outcomes for pets.

In addition to enhanced diagnostic capabilities, breakthroughs in treatment modalities have profoundly influenced veterinary oncology. Targeted therapies, for example, are designed to specifically attack cancer cells while sparing healthy tissues, leading to fewer side effects compared to traditional chemotherapy. Immunotherapy, which harnesses the body's immune system to fight cancer, has also gained traction in veterinary medicine, providing new hope for pets facing malignancies that may not respond to conventional treatments. These innovative therapies not only improve the effectiveness of treatment but also enhance the quality of life for pets undergoing cancer care. Surgical techniques have also seen significant advancements, allowing for more precise and less invasive procedures. Minimally invasive surgical techniques, such as laparoscopic surgery, enable veterinarians to perform complex tumor removals with smaller incisions, resulting in reduced recovery times and less pain for the animal. As a result, pets can return to their normal activities more quickly, which is a considerable benefit for both the animals and their owners.

### Innovative Research and Clinical Trials

Ongoing research and clinical trials in veterinary oncology are paving the way for new treatment options and therapies, significantly driving market growth. The focus on understanding cancer biology in pets has gained momentum in recent years, as veterinary professionals and researchers work collaboratively to uncover the complexities of how different types of cancer manifest and progress in animals. This research is essential, as it lays the groundwork for the development of innovative therapies tailored specifically to treat various cancers in pets. Clinical trials play a crucial role in this landscape, offering pet owners the opportunity to access cutting-edge treatments that may not yet be widely available in standard veterinary practices. These trials often involve new drugs, treatment protocols, and combination therapies that are at the forefront of veterinary oncology. By participating in clinical trials, pet owners can provide their animals with access to potentially life-saving therapies while also contributing to the advancement of veterinary medicine. This dual benefit makes participation in clinical trials an attractive option for many pet owners, particularly those

facing challenging diagnoses. In November 2023, a study from the University of Colorado Cancer Center reported on a new clinical trial at Colorado State University that is investigating CAR T-cell therapy for dogs with metastatic osteosarcoma. This initiative highlights the rising demand for advanced cancer treatments in canine oncology. The innovative approach seeks to overcome the limitations of current therapies, underscoring the expanding market for specialized cancer care in dogs. This growth is largely fueled by the increasing prevalence of cancer in canines and the pressing need for state-of-the-art treatment options.

The advancements emerging from these trials not only improve treatment outcomes for pets but also foster a sense of hope and optimism among pet owners. Many owners are eager to explore the latest options for their animals, especially when traditional treatments may have failed or when their pets are diagnosed with aggressive forms of cancer. The possibility of accessing novel therapies can be a game changer for families who are navigating the emotional and financial challenges of a cancer diagnosis. The visibility of successful outcomes from clinical trials enhances awareness and interest in veterinary oncology, encouraging more pet owners to consider specialized care.

## Segmental Insights

### Animal Type Insights

Based on the Animal Type, Canines are currently the dominant species driving demand for cancer treatment and services in the United States Veterinary Oncology Market. This trend can be attributed to several factors that contribute to the increased susceptibility of dogs to cancer compared to other pets, such as cats and horses. Statistically, it is estimated that approximately one in four dogs will develop cancer in their lifetime, a rate that is significantly higher than that observed in felines, where the incidence is closer to one in five. This heightened prevalence of cancer in dogs has led to a greater awareness and focus on canine oncology, prompting both pet owners and veterinary professionals to prioritize cancer screenings, early detection, and the exploration of advanced treatment options.

One of the key factors influencing the higher cancer rates in dogs is their genetic diversity and the effects of breeding practices. Certain breeds, especially purebreds, are predisposed to specific types of cancers due to hereditary factors. Breeds such as Golden Retrievers, Boxers, and Rottweilers have particularly high cancer rates, which has raised concerns among breeders, veterinarians, and pet owners alike. This genetic predisposition has led to increased research efforts aimed at understanding the

underlying mechanisms of cancer in these breeds, resulting in a more tailored approach to prevention and treatment. The longevity of pet dogs has increased due to advancements in veterinary care, nutrition, and overall pet health awareness. As dogs live longer, they are more likely to develop age-related diseases, including various forms of cancer. This shift has prompted pet owners to invest more in their dogs' healthcare, including regular check-ups, preventive screenings, and specialized cancer care. The awareness that early detection often leads to more effective treatment outcomes has made routine veterinary visits an essential part of responsible pet ownership.

### Therapy Insights

Based on the Therapy, chemotherapy currently stand out as the dominated treatment modality for managing cancer in pets, particularly dogs. This prominence is attributed to several factors, including the broad range of cancers it can treat, its established protocols, and its accessibility for both veterinarians and pet owners. Chemotherapy involves the use of potent drugs designed to target and kill rapidly dividing cancer cells, and it is often utilized in various treatment regimens for conditions such as lymphoma, mast cell tumors, and osteosarcoma, among others.

One key reason for chemotherapy's dominance is its effectiveness in treating specific types of cancer that are prevalent in canines. Lymphoma, for instance, is one of the most common cancers diagnosed in dogs and responds well to chemotherapy, often resulting in significant remission periods. The established protocols and dosages for various chemotherapy drugs have been well-documented in veterinary literature, allowing veterinarians to confidently administer treatment based on best practices. This level of knowledge contributes to the widespread acceptance and application of chemotherapy in veterinary oncology. Accessibility is another critical factor influencing the prominence of chemotherapy. Many general veterinary practices offer chemotherapy as part of their services, making it more readily available to pet owners compared to other modalities like radiation therapy, which often requires specialized facilities. This convenience encourages pet owners to pursue chemotherapy when faced with a cancer diagnosis, as they can often receive treatment in familiar settings. The relative affordability of certain chemotherapy drugs, especially when compared to advanced surgical interventions or immunotherapy, makes it a viable option for many pet owners who may be navigating the financial burdens associated with cancer treatment.

### Regional Insights



In the United States veterinary oncology market, the West region is currently the dominant area, driving demand for specialized cancer treatments for pets. Several factors contribute to this trend, including a higher concentration of veterinary oncology clinics, greater access to advanced treatment technologies, and a more significant awareness of pet health and wellness among pet owners in the West. One of the key reasons for the West's prominence in the United States Veterinary Oncology Market is the region's robust infrastructure for veterinary care. States like California and Washington host numerous specialty veterinary clinics and referral centers dedicated to oncology. These facilities are often equipped with state-of-the-art technologies, such as advanced imaging equipment and cutting-edge treatment modalities, allowing for more effective diagnosis and management of pet cancers. The availability of specialized services ensures that pet owners have greater access to high-quality care, significantly influencing their decisions regarding treatment options.

The cultural attitude toward pet ownership in the West tends to prioritize animal health and wellness. Many pet owners view their animals as family members, leading to increased spending on veterinary care, including specialized oncology services. This heightened focus on pet health results in more proactive measures, such as regular veterinary check-ups and screenings for early signs of cancer. Consequently, the demand for veterinary oncology services is amplified, driving growth in the market. The West region also benefits from a strong network of veterinary professionals committed to ongoing education and collaboration in the field of oncology. Many veterinarians in this region actively participate in continuing education programs, conferences, and research initiatives that focus on advancements in cancer treatment for pets. This dedication to staying current with the latest developments in veterinary oncology ensures that practitioners can offer the best possible care to their patients, further solidifying the West's position as a leader in this field.

### Key Market Players

Elanco Animal Health Incorporated

Boehringer Ingelheim Animal Health USA Inc.

Zoetis Inc

Virbac Corporation

Merck & Co., Inc.

Ardent Animal Health, LLC

Arizona Veterinary Oncology

Varian Medical Systems, Inc.

PetVet Care Centers

Las Vegas Veterinary Specialty Center

#### Report Scope:

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

United States Veterinary Oncology Market, By Animal Type:

Canine

Feline

Equine

United States Veterinary Oncology Market, By Therapy:

Radiotherapy

Surgery

Chemotherapy

Immunotherapy

Other Therapies

United States Veterinary Oncology Market, By Cancer Type:

Skin Cancers

Lymphomas

Sarcomas

Others

United States Veterinary Oncology Market, By Region:

North-East

Mid-West

West

South

Competitive Landscape

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

Available Customizations:

United States Veterinary Oncology 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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