

# **Veterinary Oncology Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Animal Type (Canine, Feline, Others), By Treatment Type (Radiotherapy, Surgery, Chemotherapy, Others), By Cancer Type (Skin Cancers, Lymphomas, Sarcomas, Others), By Region & Competition, 2021-2031F**

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## **Abstracts**

The Global Veterinary Oncology Market is projected to experience substantial growth, expanding from USD 1.82 Billion in 2025 to USD 3.62 Billion by 2031, reflecting a compound annual growth rate of 12.14%. This market covers a wide spectrum of cancer management solutions for companion animals, including diagnostic tools, surgical interventions, and therapeutic agents such as chemotherapy and immunotherapy. The primary drivers of this expansion are the increasing incidence of neoplastic diseases among aging pet populations and the strengthening bond between humans and animals, which encourages owners to seek specialized medical care. Additionally, the rapid growth of the pet insurance sector serves as a crucial financial enabler; the North American Pet Health Insurance Association reported that total premium volume in North America reached \$5.2 billion in 2024. This financial support makes complex oncological procedures more affordable for pet owners who previously found them cost-prohibitive.

Despite this positive outlook, the market encounters significant obstacles due to high treatment costs, which frequently deter owners from committing to long-term care plans. This economic barrier is further complicated by a global shortage of board-certified veterinary oncologists. This scarcity limits the availability of specialized services in many geographic regions, potentially restricting broader market growth. Consequently, while demand is rising, the combination of financial constraints and a limited specialist

workforce presents a challenge to the widespread accessibility and expansion of veterinary oncology services.

### **Market Driver**

The escalating prevalence of cancer in companion animals acts as the primary catalyst for the Global Veterinary Oncology Market. As improvements in general care extend pet lifespans, the incidence of neoplastic diseases has naturally increased, creating a greater need for frequent and sophisticated oncological interventions. This trend is substantiated by recent epidemiological data; a study published in PLOS One in April 2024 calculated the overall tumor incidence rate in dogs at 775 per 100,000 dog-years at risk, with skin tumors constituting the largest category at 34.64% of cases. This rising patient volume is supported by an increase in owner spending power and a willingness to invest in medical outcomes. According to the American Pet Products Association, annual U.S. veterinary care and product sales hit \$38.3 billion in March 2024, demonstrating a strong financial ecosystem that facilitates the adoption of these critical services.

Simultaneously, the development of novel targeted therapies and immunotherapies is transforming the clinical landscape, shifting the market focus from traditional chemotherapy toward precision medicine. Pharmaceutical and biotech companies are increasingly utilizing artificial intelligence and genomic profiling to design tailored treatment regimens that offer improved efficacy with fewer side effects. The impact of this technological shift is evident in recent clinical results; according to Imprimed in March 2024, dogs with high-grade T-cell lymphoma treated with AI-predicted protocols achieved a remission rate of 59%, significantly surpassing the 9.1% remission rate seen in the low-matching group. These advancements not only enhance survival rates but also validate the commercial potential of sophisticated oncological solutions, encouraging continued investment in research and development.

### **Market Challenge**

Prohibitive treatment expenses constitute a major barrier to the expansion of the Global Veterinary Oncology Market. The high costs associated with advanced cancer care, spanning diagnostics, specialized surgeries, and long-term chemotherapy, often exceed the financial means of many pet owners. This economic gap frequently forces clients to decline recommended oncological interventions in favor of less expensive palliative options or euthanasia. Such financial limitations directly reduce the volume of complex procedures performed, thereby suppressing revenue growth for specialized veterinary

centers and pharmaceutical suppliers that depend on the widespread adoption of these advanced therapies.

This sensitivity to cost is mirrored in recent industry data showing a contraction in consumer spending on animal healthcare, which disproportionately impacts high-cost specialties. According to the American Veterinary Medical Association, overall veterinary spending dropped by 4% in 2024 compared to the previous year as pet owners faced tighter budgets. This reduction in spending capacity limits the addressable market for expensive oncology treatments, as financial feasibility remains a primary decision-making factor for clients. Consequently, the market faces capped growth potential, as the high price point of effective cancer management renders it inaccessible to a significant segment of the pet-owning population.

## **Market Trends**

The emergence of liquid biopsy and non-invasive diagnostic testing is revolutionizing the detection of neoplastic diseases by moving away from invasive tissue sampling toward blood-based biomarker screening. This diagnostic method enables veterinarians to identify circulating tumor DNA or nucleosomes at earlier stages of disease, significantly enhancing prognostic accuracy and monitoring capabilities without the risks associated with surgical biopsies. The commercial adoption of these accessible screening tools is accelerating as they become integrated into routine wellness exams for aging pets. For example, VolitionRx reported in December 2024 that it sold approximately 50,000 units of its Nu.Q Vet Cancer Screening Test in the third quarter alone, highlighting the robust market demand for reliable, non-invasive diagnostic solutions.

concurrently, advancements in stereotactic and mobile radiation therapy technologies are reshaping treatment protocols by allowing for the delivery of high-dose radiation with sub-millimeter precision. Unlike traditional fractionated radiotherapy that requires numerous anesthetic events over several weeks, stereotactic radiosurgery (SRS) and stereotactic body radiation therapy (SBRT) typically condense treatment into just one to three sessions, reducing patient stress and anesthesia-related risks. This technological evolution expands the treatable patient base to include cases previously considered unresectable or too medically fragile for conventional courses. According to Thrive Pet Healthcare in April 2024, its specialty partner PetCure Oncology achieved a significant clinical milestone by administering these advanced radiation therapies to over 8,000 pets, validating the growing reliance on precise, high-efficiency therapeutic modalities.

## Key Market Players

Elanco Animal Health Incorporated

Boehringer Ingelheim International GmbH

Zoetis Inc.

Elekta AB

PetCure Oncology

Accuray Incorporated

Varian Medical Systems, Inc.

Virbac S.A.

Merck & Co., Inc.

Dechra Pharmaceuticals PLC

NovaVive Inc.

Ardent Animal Health, LLC

## Report Scope

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

Veterinary Oncology Market, By Animal Type

Canine

Feline

Others

### Veterinary Oncology Market, By Treatment Type

Radiotherapy

Surgery

Chemotherapy

Others

### Veterinary Oncology Market, By Cancer Type

Skin Cancers

Lymphomas

Sarcomas

Others

### Veterinary Oncology Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

## **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Veterinary Oncology Market.

**Available Customizations:**

Global 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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