

United States Veterinary Stereotactic Radiosurgery System Market By Product (Gamma Knife, LINAC, Proton Beam Radiation Therapy (PBRT)/ Flash-RT, CyberKnife), By Application (Brain Tumours, Spinal Tumours, Other Applications), By End User (Veterinary Hospitals, Veterinary Specialty Clinics, Research and Academic Institutions), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Report description:

Market Overview

The United States Veterinary Stereotactic Radiosurgery System Market was valued at USD 1.18 billion in 2024 and is projected to reach USD 2.03 billion by 2030, growing at a CAGR of 9.44%. Market growth is being fueled by the increasing prevalence of cancer among companion animals and the rising demand for precise, non-invasive treatments. As awareness of advanced therapeutic options grows, pet owners are more inclined to pursue radiosurgery for tumors in the brain, spine, and nasal regions. Technologies such as linear accelerator (LINAC)-based systems, known for their precision and reduced treatment sessions, are gaining popularity. Additional innovations, including image-guided radiotherapy (IGRT), motion management, and emerging techniques like Proton Beam Radiation Therapy (PBRT) and Flash Radiation Therapy, are transforming oncology practices. Integration of AI-assisted diagnostics and software-driven treatment planning is enhancing accuracy, expanding application scope, and reshaping veterinary cancer care delivery in the United States.

Key Market Drivers

Rising Pet Ownership

An increase in pet ownership across the United States is a key factor propelling the growth of the Veterinary Stereotactic Radiosurgery System Market. According to the American Pet Products Association (APPA), as of 2023, approximately 66% of U.S. households-more than 86 million-own a pet, predominantly dogs and cats. As pets are more commonly viewed as family members, there is a growing willingness among owners to pursue specialized and high-quality medical treatments, including

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advanced oncology procedures. This trend is driving demand for non-invasive technologies such as stereotactic radiosurgery, which is valued for its precision and minimal recovery time.

The surge in veterinary healthcare spending further supports this trend. In 2023, U.S. pet owners spent over USD 38 billion on veterinary care and related services, reflecting growing investment in innovative treatments. Veterinary clinics and specialty hospitals are increasingly adopting technologies like SRS to meet this rising demand and maintain competitive positioning in a market focused on delivering optimal patient outcomes.

Key Market Challenges

Limited Availability of Specialized Veterinary Oncologists

A major constraint on market expansion is the limited pool of specialized veterinary oncologists trained in stereotactic radiosurgery (SRS). These advanced systems require operators with expertise in veterinary oncology and proficiency in handling complex radiological equipment. However, the number of professionals with the requisite skills is currently insufficient to meet growing demand, particularly in regions where veterinary oncology is still an emerging field.

Further compounding this issue is the scarcity of training and certification programs in veterinary radiation oncology. While some educational institutions are introducing relevant curricula, the pace of workforce development lags behind market needs. In less urban or under-resourced regions, the absence of specialists makes it challenging for veterinary clinics to offer SRS, especially given the financial investment required for installation, maintenance, and ongoing professional training. These limitations constrain access to radiosurgery services and hinder the broader adoption of this advanced treatment modality.

Key Market Trends

Growing Adoption of Non-Invasive Treatments

A key trend in the United States Veterinary Stereotactic Radiosurgery System Market is the rising preference for non-invasive therapeutic solutions. With greater awareness of animal well-being and advancements in medical technology, both pet owners and veterinary professionals are turning to minimally invasive methods for treating complex conditions. SRS is gaining traction due to its ability to deliver targeted radiation with minimal damage to surrounding tissue, thereby reducing discomfort and accelerating recovery. This makes it particularly suitable for treating delicate or inoperable tumors in areas like the brain and spine.

This shift is driven by a cultural evolution that views pets as family members deserving of high-quality care. Non-invasive methods like SRS offer reduced hospitalization time, less post-treatment pain, and superior outcomes-benefits that resonate with pet owners. The increasing success of similar techniques in human healthcare has also boosted confidence in their veterinary applications. As clinics invest in advanced radiosurgery systems, they are better positioned to meet the demand for less invasive, more efficient cancer treatments. This trend is expected to continue, supported by growing veterinary healthcare spending and technological innovation.

Key Market Players

- Avante Health Solutions
- Accuray Inc.
- Elekta AB
- Varian Medical Systems Inc.
- PetCure Oncology
- Xstrahl Inc.
- CVS Group
- Medtronic PLC
- Nanovi AS
- Merck & Co. Inc.

Report Scope:

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

- United States Veterinary Stereotactic Radiosurgery System Market, By Product:
 - o Gamma Knife

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- o LINAC
- o Proton Beam Radiation Therapy (PBRT)/ Flash-RT
- o CyberKnife
- United States Veterinary Stereotactic Radiosurgery System Market, By Application:
 - o Brain Tumours
 - o Spinal Tumours
 - o Other Applications
- United States Veterinary Stereotactic Radiosurgery System Market, By End User:
 - o Veterinary Hospitals
 - o Veterinary Specialty Clinics
 - o Research and Academic Institutions
- United States Veterinary Stereotactic Radiosurgery System Market, By Region:
 - o North-East
 - o Mid-West
 - o West
 - o South

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United States Veterinary Stereotactic Radiosurgery System Market.

Available Customizations:

United States Veterinary Stereotactic Radiosurgery System 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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