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United Kingdom Veterinary Healthcare - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-08-01 | 120 pages | Mordor Intelligence

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Report description:

United Kingdom Veterinary Healthcare Market Analysis

The United Kingdom veterinary healthcare market size reached USD 3.38 billion in 2025 and is projected to attain USD 4.84 billion by 2030, advancing at a 7.45% CAGR during the forecast period. Companion animal ownership has risen to 60% of households, a structural demand driver that cushions the market against Brexit-related supply realignments. Consolidation among practice groups strengthens purchasing power and accelerates technology adoption, yet it intensifies regulatory scrutiny aimed at protecting consumer choice. Rapid upgrades in point-of-care testing, artificial intelligence (AI) diagnostics and long-acting parasiticides elevate clinical standards while widening revenue streams for practices. Meanwhile, livestock operators expand biosecurity programs in response to repeated H5N1 alerts, anchoring steady volumes for vaccines and surveillance services.

United Kingdom Veterinary Healthcare Market Trends and Insights

Technological Advancements In Veterinary Therapeutics and Diagnostics

AI-enabled platforms such as Zoetis' Vetscan Imagyst now provide on-site cytology in minutes, freeing scarce clinicians for higher-value tasks and reducing diagnostic error rates. Portable infrared thermography and wearable sensors extend continuous monitoring for livestock, triggering early alerts that curb herd-level losses. Integrated telemedicine portals tethered to in-clinic devices foster hybrid workflows that expand reach into rural communities. IDEXX's inVue analyzer shows how modular chemistry, hematology and urinalysis stations compress full laboratory capability into countertop space, enabling same-visit treatment decisions. Long-acting parasiticides such as MSD's BRAVECTO chewable extend dose intervals to 12 weeks, reinforcing owner compliance while moderating antimicrobial use.

Growing Companion Animal Ownership and Expenditure

Seventeen-point-two million UK households housed a pet in 2024, with the dog and cat population growing by 1.5 million annually. Owners treat animals as family members, elevating demand for oncology, orthopedic and behavioral services once confined to human medicine. Men now account for 27% of adult-cat adoptions versus 18% for women, shifting product and service preferences toward technology-driven convenience. Aged pets require chronic disease management, extending lifetime spend per animal. Emotional capital forged during pandemic lockdowns sustains willingness to finance premium diagnostics, fueling revenue beyond pure volume growth.

Escalating Cost of Veterinary Services and Products

Average veterinary invoices have climbed 60% since 2014, amplifying affordability barriers that push some owners to postpone treatments. The Dogs Trust reports clients weighing elective care against budget constraints, signaling elastic demand that could temper overall growth. Forty percent of clinic employees say revenue targets sway clinical decisions, fueling CMA scrutiny. IDEXX noted a 2.1% dip in visit frequency in 2024 despite value gains, highlighting price sensitivity in preventive care segments.

Other drivers and restraints analyzed in the detailed report include:

Rising Livestock Health Management Needs Amid Zoonotic Risks / Expansion Of Corporate Veterinary Practice Networks / Limited Availability of Skilled Veterinary Professionals /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Therapeutics generated 60.32% of United Kingdom veterinary healthcare market share in 2024, reflecting entrenched demand for vaccines, parasiticides and anti-infectives. Diagnostics is growing at a 7.67% CAGR as point-of-care devices and AI analytics shorten the path from sample to therapy. Immunodiagnostics dominate revenue today, while molecular assays scale rapidly for resistance profiling. Portable ultrasound and digital radiography embed in primary care, replacing referrals and unlocking ancillary fees. Within therapeutics, vaccine uptake accelerates on heightened biosecurity awareness, whereas antimicrobial-laden feed additives face regulatory headwinds, nudging manufacturers toward precision nutrition alternatives.

Investment in diagnostics aligns with evidence-based protocols that lower drug overuse and improve outcomes, further anchoring recurring consumables revenue. AI platforms classify cytology slides in under eight minutes, enabling same-day oncology interventions. As practice groups aggregate, bulk procurement of analyzers lowers per-test costs, widening access to advanced assays even in mid-tier clinics.

Dogs and cats accounted for 45.32% of United Kingdom veterinary healthcare market size in 2024, supported by 13.5 million dogs and 12.5 million cats needing routine, emergency and specialty care. Poultry is projected to expand at an 8.01% CAGR as stringent avian influenza surveillance heightens veterinary oversight across commercial flocks. Equine demand remains stable, fueled by sports and leisure riding, while ruminant health programs gain traction under climate-adaptation pressures. Swine operators adopt modern traceability, yet African swine fever vigilance keeps veterinary certification volumes high.

Pet humanization drives uptake of chemotherapy, MRI scans and behavioral therapies, elevating average spend per visit. Poultry producers embed veterinarians in biosecurity governance, reducing downtime costs from disease outbreaks. Cross-species H5N1 transmission to sheep in 2024 underlines growing need for multi-species surveillance frameworks.

The United Kingdom Veterinary Healthcare Market Report is Segmented by Product (Therapeutics and Diagnostics), Animal Type (Dogs & Cats, Horses, and More), Route of Administration (Oral, Parenteral, Topical, and Other Route of Administrations), and End User (Veterinary Hospitals & Clinics, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Zoetis / MSD Animal Health / Boehringer Ingelheim / Elanco / Virbac / Vetoquinol / Ceva Sante Animale / Covetrus / ECO Animal Health Group / KRKA UK / TVM UK / Dechra Pharmaceuticals / Pets at Home Vet Group / CVS Group plc / IDEXX / Norbrook Laboratories / Parnell Pharma / Abaxis UK (Zoetis) / Henry Schein Animal Health / MiLab (Lab Services) /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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