

United Kingdom Veterinary Healthcare - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

United Kingdom Veterinary Healthcare Market Analysis

The United Kingdom veterinary healthcare market was valued at USD 3.38 billion in 2025 and estimated to grow from USD 3.63 billion in 2026 to reach USD 5.17 billion by 2031, at a CAGR of 7.38% during the forecast period (2026-2031). 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,

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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 59.78% of United Kingdom veterinary healthcare market share in 2025, reflecting entrenched demand for vaccines, parasiticides and anti-infectives. Diagnostics is growing at a 7.59% 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 44.86% of United Kingdom veterinary healthcare market size in 2025, supported by 13.5 million dogs and 12.5 million cats needing routine, emergency and specialty care. Poultry is projected to expand at an 7.93% 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.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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

Table of Contents:

- 1 Introduction
 - 1.1 Study Assumptions & Market Definition
 - 1.2 Scope of the Study
- 2 Research Methodology
- 3 Executive Summary
- 4 Market Landscape
 - 4.1 Market Overview
 - 4.2 Market Drivers
 - 4.2.1 Technological Advancements in Veterinary Therapeutics and Diagnostics
 - 4.2.2 Growing Companion Animal Ownership and Expenditure
 - 4.2.3 Rising Livestock Health Management Needs Amid Zoonotic Risks
 - 4.2.4 Expansion of Corporate Veterinary Practice Networks
 - 4.2.5 Increasing Adoption of Pet Insurance And Wellness Plans
 - 4.2.6 Government and Regulatory Support for One-Health Initiatives
 - 4.3 Market Restraints
 - 4.3.1 Escalating Cost of Veterinary Services and Products
 - 4.3.2 Limited Availability of Skilled Veterinary Professionals
 - 4.3.3 Prevalence of Counterfeit and Sub-Standard Medicines
 - 4.3.4 Market Consolidation Impacting Supplier Bargaining Power
 - 4.4 Regulatory Landscape
 - 4.5 Porter's Five Forces Analysis
 - 4.5.1 Bargaining Power Of Suppliers
 - 4.5.2 Bargaining Power Of Buyers/Consumers
 - 4.5.3 Threat Of New Entrants

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.5.4 Threat Of Substitute Products
- 4.5.5 Intensity Of Competitive Rivalry

5 Market Size & Growth Forecasts (Value, USD)

- 5.1 By Product
 - 5.1.1 Therapeutics
 - 5.1.1.1 Vaccines
 - 5.1.1.2 Parasiticides
 - 5.1.1.3 Anti-Infectives
 - 5.1.1.4 Medical Feed Additives
 - 5.1.1.5 Other Therapeutics
 - 5.1.2 Diagnostics
 - 5.1.2.1 Immunodiagnostic Tests
 - 5.1.2.2 Molecular Diagnostics
 - 5.1.2.3 Diagnostic Imaging
 - 5.1.2.4 Clinical Chemistry
 - 5.1.2.5 Other Diagnostics
- 5.2 By Animal Type
 - 5.2.1 Dogs & Cats
 - 5.2.2 Horses
 - 5.2.3 Ruminants
 - 5.2.4 Swine
 - 5.2.5 Poultry
 - 5.2.6 Other Animal Types

6 Market Size & Growth Forecasts (Value, USD)

- 6.1 By Product
 - 6.1.1 Therapeutics
 - 6.1.1.1 Vaccines
 - 6.1.1.2 Parasiticides
 - 6.1.1.3 Anti-Infectives
 - 6.1.1.4 Medical Feed Additives
 - 6.1.1.5 Other Therapeutics
 - 6.1.2 Diagnostics
 - 6.1.2.1 Immunodiagnostic Tests
 - 6.1.2.2 Molecular Diagnostics
 - 6.1.2.3 Diagnostic Imaging
 - 6.1.2.4 Clinical Chemistry
 - 6.1.2.5 Other Diagnostics
- 6.2 By Animal Type
 - 6.2.1 Dogs & Cats
 - 6.2.2 Horses
 - 6.2.3 Ruminants
 - 6.2.4 Swine
 - 6.2.5 Poultry
 - 6.2.6 Other Animal Types
- 6.3 By Route Of Administration

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.3.1 Oral
- 6.3.2 Parenteral
- 6.3.3 Topical
- 6.3.4 Other Route of Administrations
- 6.4 By End User
 - 6.4.1 Veterinary Hospitals & Clinics
 - 6.4.2 Reference Laboratories
 - 6.4.3 Point-Of-Care / In-House Testing Settings
 - 6.4.4 Academic & Research Institutes

7 Competitive Landscape

- 7.1 Market Concentration
- 7.2 Market Share Analysis
- 7.3 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share, Products & Services, Recent Developments)
 - 7.3.1 Zoetis Inc.
 - 7.3.2 MSD Animal Health
 - 7.3.3 Boehringer Ingelheim
 - 7.3.4 Elanco Animal Health
 - 7.3.5 Virbac Corporation
 - 7.3.6 Vetoquinol
 - 7.3.7 Ceva Sante Animale
 - 7.3.8 Covetrus
 - 7.3.9 ECO Animal Health Group
 - 7.3.10 KRKA UK Ltd
 - 7.3.11 TVM UK
 - 7.3.12 Dechra Pharmaceuticals
 - 7.3.13 Pets at Home Vet Group
 - 7.3.14 CVS Group plc
 - 7.3.15 IDEXX Laboratories
 - 7.3.16 Norbrook Laboratories
 - 7.3.17 Parnell Pharma
 - 7.3.18 Abaxis UK (Zoetis)
 - 7.3.19 Henry Schein Animal Health
 - 7.3.20 MiLab (Lab Services)

8 Market Opportunities & Future Outlook

- 8.1 White-space & Unmet-need Assessment

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

United Kingdom Veterinary Healthcare - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-01"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

