CMA concludes market investigation with major reforms to veterinary sector

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The CMA has set out its final reforms – which will start coming into force later this year – to help pet owners better navigate the vet services market.

- Legally binding measures include price lists, prescription fee caps, a price comparison website and mandatory branding by the large groups to boost competition and drive down prices
- Pet owners using a vet practice that is part of a larger chain can expect to see changes before Christmas – including standard price lists

The Competition and Markets Authority (CMA) has today concluded its investigation into veterinary services for household pets in the UK, after an independent inquiry group found that the current system is leaving pet owners in the dark. A lack of information that helps people make informed decisions is leading to weak competition and high prices.

An unprecedented response from both the public and the sector has help to shape the CMA’s final report, which green lights a package of measures to make the market more competitive, easier to navigate and more responsive to pet owners’ needs. The investigation has intensified public scrutiny of the veterinary services industry, yet the professionalism, compassion, and commitment to animal welfare shown by veterinary professionals remains unquestioned.

Martin Coleman, Chair of the independent Inquiry Group, said:

> This is the most extensive review of veterinary services in a generation, and today’s reforms will make a real difference to the millions of pet owners who want the best for their pets but struggle to find the practice, treatment and price that meets their needs.
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> Too often, people are left in the dark about who owns their practice, treatment options and prices – even when facing bills running into thousands of pounds. Our measures mean it will be made clear to pet owners which practices are part of large groups, which are charging higher prices, and for the first time, vet businesses will be held to account by an independent regulator.
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> Our changes put pet owners at the centre but also help vets by enhancing trust in the profession and protecting clinical judgement from undue commercial pressure – and that is important to ensure our pets continue to get the best care.

Key remedies

The report outlines the final remedies and recommendations which together will transform the market. More details on when the changes will happen can be found in the timetable for remedies.

What’s happening now	New experience
Less than 40% of practices have prices on their websites - they cover few services and are sometimes hard to find.	Practices publish a comprehensive price list for standard services – including consultations, common procedures, diagnostics, written prescriptions and cremation options.
No easy or centralised way to compare local practices.	Price and ownership information available to pet owners through Royal College of Veterinary Surgeons (RCVS) ‘Find a Vet’ service which will share the data with third-party comparison sites.
Less than half of people using a large veterinary group knew that their practice was part of a chain.	Vet businesses must make it clear whether they are part of a group or an independent business – common ownership will be displayed on signage, at the premises and online.
Less than half of people received pricing information in advance of recent non-routine treatment. Only 29% of these were given price information in writing.	Practices provide a written estimate in advance for any treatment expected to cost £500 or more (including aftercare costs) – plus an itemised bill. Emergencies are the only exception for written estimates.
Over 70% of pet owners purchase long-term medication from their vet practice even though many could save £200 a year or more if they bought online.	Pet owners must be told they can have a written prescription which could save them money.
Some pet owners are being charged high prices for written prescriptions – many practices charge £30 or above for each prescription.	Written prescription fees are capped at £21 (for the first medicine) and £12.50 (for any additional medicines).
Vets’ duty to provide pet owners with independent and impartial advice has the potential to be compromised by commercial pressure.	Practices must have written policies in place to ensure vets are empowered to offer independent and impartial advice.
Pet care plans can be poor value for people who do not use many of the services included.	Pet plans clearly set out the price of each component, the total cost and how any advertised savings are calculated.
Pet owners may be paying around £100 more for individual cremations than they would be if there was strong price competition.	Practices provide clear, upfront prices for all cremation options including any add-ons – and offer the lower cost option of a communal cremation.
Vet practices have long notice periods in their contracts with out-of-hours providers and high exit fees can make it difficult for them to switch provider.	Out-of-hours providers will be banned from imposing unreasonably long notice periods – so practices can easily end the contract if they can get a better service for pet owners elsewhere.
The complaints system is ineffective with no mandatory process for vet practices or redress system when things go wrong for pet owners.	Practices must follow a transparent, accessible in-house complaints process and engage in mediation where disputes cannot be resolved.

Regulation and legislative reform

Competition alone is not enough to protect consumers. The current legal regime is 60 years old, outdated, and applies to individual vets but not businesses or practices – leaving key parts of the system unregulated and allowing the very concerns we have identified to emerge.

The CMA has been clear from the outset that modern legislation is overdue, and that consumers would benefit from tougher monitoring and enforcement of regulatory standards. It therefore backs the government's proposed reforms to the Veterinary Services Act which, for the first time, would make veterinary businesses as well as individuals accountable to an independent regulator. That accountability would cover the protection of consumers and fair competition in addition to clinical standards. The proposals also support the CMA's call to protect the title of veterinary nurses and expand the range of tasks they can undertake.

The RCVS will take a central role in monitoring compliance by businesses and individual practitioners, running the comparison service and supporting our remedies. The costs of these activities will be funded by a levy on veterinary businesses in proportion to the size of their business. The CMA's current estimate suggests this would be no more than £150 to £250 per practice to cover the RCVS's initial set up costs and £450 to £550 annually per practice to cover the RCVS's ongoing costs.

Secretary of State for Environment, Food and Rural Affairs, Emma Reynolds said:

> We are grateful for all the work of the Competition and Markets Authority.
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> This government is focused on helping families save money on vet services by improving transparency and choice around pricing, so the public can make informed decisions about their pets' care.
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> We will respond to the report and set out next steps for our proposed reforms in due course.

Next steps

The final report marks the end of the market investigation. The next stage gives the CMA 6 months to put in place legally binding Orders on businesses and to accept undertakings from the RCVS or impose an Order, to implement these remedies. These will therefore be in place by 23 September 2026.

Once the CMA Orders are made, nearly all remedies will be in place in the following three to 12 months. For most of the remedies, smaller veterinary businesses will have 3 months longer to implement the proposed changes than larger businesses.

The CMA will work closely with the sector, including the RCVS, British Veterinary Association (BVA) and British Veterinary Nursing Association (BVNA), to ensure businesses understand what is required of them and by when, strengthening competition and helping the sector deliver better outcomes for pets and their owners.

The independent Inquiry Group's full decision is available on the case page . An explainer for veterinary businesses on the remedies package is also provided.

Notes to editors:

1. The CMA launched its review of the sector in September 2023 and issued a Call for Information (CFI) as part of that. This brought 56,000 responses – including 45,000 from the general public and 11,000 responses from those working in the veterinary industry, which equates to around a fifth of UK vets and veterinary nurses.

2. The CMA’s decision to consult on a market investigation was based on a range of evidence: the Call for Information on the CMA’s website, qualitative market research with pet owners as well as broad engagement across the sector, including with all 6 large veterinary groups (LVGs), a number of independent veterinary practices, industry regulators, industry bodies, government agencies, the animal charity sector, and pet insurance companies.
3. The 6 LVGs are: CVS, IVC, Linnaeus, Medivet, Pets at Home and VetPartners.
4. According to ONS data the vets sector is valued at over £6.7billion (Source: ONS National Accounts, Other recreational goods Veterinary and other services for pets)
5. It is estimated that 60% of UK households (17.2 million) owned a pet in 2024 (Source:UK Pet Food UK Pet Population/ UK Pet Food)
6. All media enquiries should be directed to the CMA press office by email on press@cma.gov.uk, or by phone on 020 3738 6460.

https://www.gov.uk/government/news/cma-concludes-market-investigation-with-major-reforms-to-veterinary-sector