

# **Anxiety & Behaviour Support Products Market Forecasts to 2034 – Global Analysis By Product Type (Calming Treats, Supplements, Anxiety Vests, Pheromone Products, Training Aids, Toys & Enrichment Products, Other Product Types), By Ingredient Type, By Form, By Application, By End User and By Geography**

<https://marketpublishers.com/r/AD21B8E4B46FEN.html>

Date: March 2026

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: AD21B8E4B46FEN

## **Abstracts**

According to Statistics MRC, the Global Anxiety & Behaviour Support Products Market is accounted for \$2.1 billion in 2026 and is expected to reach \$4.5 billion by 2034 growing at a CAGR of 9.8% during the forecast period. Anxiety & Behaviour Support Products are interventions for pets designed to reduce stress, aggression, or fear-related behaviors. They include calming treats, pheromone diffusers, wearable devices, behavioral training aids, and interactive toys. These products support mental health, improve owner–pet relationships, and enhance quality of life. Increasing awareness of pets' emotional wellbeing, the rise of urban living, and behavioral issues due to separation or environmental changes drive market growth. Integration of natural ingredients, smart monitoring, and veterinary guidance enhances efficacy, safety, and adoption of these support products.

### **Market Dynamics:**

Driver:

Increasing awareness of pet mental health

Pet owners are increasingly recognizing stress, separation anxiety, and behavioural

issues in their pets. Rising humanization of pets has led to greater emphasis on emotional well-being alongside physical health. Social media and veterinary campaigns are amplifying awareness about calming solutions. Owners are more willing to invest in supplements, treats, and devices that improve behavioural balance. This heightened focus on mental health continues to fuel market expansion globally.

#### Restraint:

##### Limited clinical evidence for efficacy

Many calming treats and supplements lack standardized trials to prove consistent results. Skepticism among veterinarians and pet owners slows adoption in certain regions. Regulatory bodies demand stronger evidence before approving new formulations. This gap between consumer demand and scientific validation creates uncertainty in the market. As a result, limited clinical backing continues to hinder broader acceptance.

#### Opportunity:

##### AI-based behavioral monitoring devices

Smart collars and wearable trackers can monitor stress indicators such as heart rate and activity levels. AI algorithms provide personalized recommendations for calming routines and supplements. Integration with mobile apps allows owners to track behavioural patterns in real time. Veterinary clinics can use these insights to design tailored treatment plans. This technological innovation is expected to accelerate premium adoption and strengthen market credibility.

#### Threat:

##### Regulatory restrictions on supplements

Authorities in different regions impose strict guidelines on pet supplements, limiting product launches. Variations in approval processes across countries create barriers for global expansion. Companies face delays and added costs in meeting compliance standards. Mislabeling or exaggerated claims can lead to product recalls, damaging brand reputation. This regulatory complexity continues to challenge the industry's growth trajectory.

### **Covid-19 Impact:**

The Covid-19 pandemic had mixed effects on the anxiety and behaviour support products market. On one hand, supply chain disruptions affected production and distribution of calming supplements and devices. On the other hand, increased pet adoption during lockdowns boosted demand for behavioural support solutions. Owners spending more time at home became more attentive to their pets' emotional needs. Online sales channels grew rapidly as physical retail faced restrictions. Overall, the pandemic accelerated digital adoption while highlighting supply chain vulnerabilities.

The calming treats segment is expected to be the largest during the forecast period

The calming treats segment is expected to account for the largest market share during the forecast period as they are convenient, widely available, and easy to administer. Pet owners prefer treats over supplements due to their palatability and functional benefits. Manufacturers are innovating with natural ingredients such as chamomile, valerian root, and hemp extracts. Retail penetration of calming treats is higher compared to other behavioural support products. Rising awareness of stress management in pets further strengthens demand for this segment.

The veterinary clinics segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the veterinary clinics segment is predicted to witness the highest growth rate due to increasing reliance on professional guidance for behavioural issues. Clinics are integrating calming supplements and monitoring devices into treatment plans. Rising awareness campaigns by veterinarians are boosting consumer trust in these products. Clinics also serve as distribution hubs, enhancing product visibility and credibility. Personalized recommendations from veterinary professionals encourage premium adoption.

### **Region with largest share:**

During the forecast period, the North America region is expected to hold the largest market share owing to high pet ownership rates and strong purchasing power. Consumers in the U.S. and Canada are highly receptive to behavioural support products. Established brands and veterinary networks are driving adoption of calming treats and supplements. Retail penetration of premium products is higher in North America compared to other regions. Strong awareness campaigns and digital marketing

further support growth. These factors collectively ensure North America's dominance in market share.

### **Region with highest CAGR:**

Over the forecast period, the Europe region is anticipated to exhibit the highest CAGR driven by rising awareness of pet mental health and supportive regulatory frameworks. Countries such as Germany, France, and the UK are witnessing increased demand for behavioural support solutions. European consumers are highly receptive to natural and eco-friendly calming products. Veterinary endorsements and clinical trials are strengthening credibility in the region. Local startups are entering the market with innovative AI-based monitoring devices.

### **Key players in the market**

Some of the key players in Anxiety & Behaviour Support Products Market include Nestlé, Purina PetCare, Mars Petcare, Ceva Santé Animale, Zylkene (Vetoquinol), ThunderShirt, Adaptil (Ceva), Pet Naturals of Vermont, VetriScience Laboratories, Rescue Remedy Pets, HempMy Pet, Honest Paws, Bach Flower Remedies, PetHonesty, NaturVet and Only Natural Pet.

### **Key Developments:**

In November 2025, Purina Pro Plan Veterinary announced a partnership with Ease, an online platform for veterinary behaviour specialty care. This collaboration gives veterinary clinics free access to board-certified behaviourists, expanding Purina's support mission to address pet anxiety and behavioural challenges through professional guidance.

In November 2025, Ceva unveiled its Douxo Spa product line for pets during the holiday season. While primarily a dermatology and wellness product, it complements Ceva's behavioural support portfolio by addressing comfort and wellbeing, which are closely linked to stress reduction in pets.

### **Product Types Covered:**

Calming Treats

Supplements

Anxiety Vests

Pheromone Products

Training Aids

Toys & Enrichment Products

Other Product Types

#### Ingredient Types Covered:

Herbal-Based

CBD-Based

Synthetic Compounds

Vitamin & Mineral Blends

Amino Acids

Probiotics

Other Ingredient Types

#### Forms Covered:

Chews & Tablets

Powder

Liquid

Sprays

Collars & Diffusers

Wearables

Other Forms

Applications Covered:

Separation Anxiety

Noise Phobia

Aggression Management

Travel Anxiety

Training & Behaviour Correction

General Stress Relief

Other Applications

End Users Covered:

Pet Owners

Veterinary Clinics

Pet Trainers

Pet Specialty Stores

Online Retailers

Animal Shelters

Other End Users

## Regions Covered:

### North America

United States

Canada

Mexico

### Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

### Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

**What our report offers:**

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

**Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

## Contents

### **1 EXECUTIVE SUMMARY**

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

### **2 RESEARCH FRAMEWORK**

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
  - 2.4.1 Data Collection (Primary and Secondary)
  - 2.4.2 Data Modeling and Estimation Techniques
  - 2.4.3 Data Validation and Triangulation
  - 2.4.4 Analytical and Forecasting Approach

### **3 MARKET DYNAMICS AND TREND ANALYSIS**

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

### **4 COMPETITIVE AND STRATEGIC ASSESSMENT**

- 4.1 Porter's Five Forces Analysis
  - 4.1.1 Supplier Bargaining Power
  - 4.1.2 Buyer Bargaining Power
  - 4.1.3 Threat of Substitutes
  - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

## **5 GLOBAL ANXIETY & BEHAVIOUR SUPPORT PRODUCTS MARKET, BY PRODUCT TYPE**

- 5.1 Calming Treats
- 5.2 Supplements
- 5.3 Anxiety Vests
- 5.4 Pheromone Products
- 5.5 Training Aids
- 5.6 Toys & Enrichment Products
- 5.7 Other Product Types

## **6 GLOBAL ANXIETY & BEHAVIOUR SUPPORT PRODUCTS MARKET, BY INGREDIENT TYPE**

- 6.1 Herbal-Based
- 6.2 CBD-Based
- 6.3 Synthetic Compounds
- 6.4 Vitamin & Mineral Blends
- 6.5 Amino Acids
- 6.6 Probiotics
- 6.7 Other Ingredient Types

## **7 GLOBAL ANXIETY & BEHAVIOUR SUPPORT PRODUCTS MARKET, BY FORM**

- 7.1 Chews & Tablets
- 7.2 Powder
- 7.3 Liquid
- 7.4 Sprays
- 7.5 Collars & Diffusers
- 7.6 Wearables
- 7.7 Other Forms

## **8 GLOBAL ANXIETY & BEHAVIOUR SUPPORT PRODUCTS MARKET, BY APPLICATION**

- 8.1 Separation Anxiety
- 8.2 Noise Phobia
- 8.3 Aggression Management
- 8.4 Travel Anxiety
- 8.5 Training & Behaviour Correction
- 8.6 General Stress Relief
- 8.7 Other Applications

## **9 GLOBAL ANXIETY & BEHAVIOUR SUPPORT PRODUCTS MARKET, BY END USER**

- 9.1 Pet Owners
- 9.2 Veterinary Clinics
- 9.3 Pet Trainers
- 9.4 Pet Specialty Stores
- 9.5 Online Retailers
- 9.6 Animal Shelters
- 9.7 Other End Users

## **10 GLOBAL ANXIETY & BEHAVIOUR SUPPORT PRODUCTS MARKET, BY GEOGRAPHY**

- 10.1 North America
  - 10.1.1 United States
  - 10.1.2 Canada
  - 10.1.3 Mexico
- 10.2 Europe
  - 10.2.1 United Kingdom
  - 10.2.2 Germany
  - 10.2.3 France
  - 10.2.4 Italy
  - 10.2.5 Spain
  - 10.2.6 Netherlands
  - 10.2.7 Belgium
  - 10.2.8 Sweden
  - 10.2.9 Switzerland
  - 10.2.10 Poland
  - 10.2.11 Rest of Europe
- 10.3 Asia Pacific

- 10.3.1 China
- 10.3.2 Japan
- 10.3.3 India
- 10.3.4 South Korea
- 10.3.5 Australia
- 10.3.6 Indonesia
- 10.3.7 Thailand
- 10.3.8 Malaysia
- 10.3.9 Singapore
- 10.3.10 Vietnam
- 10.3.11 Rest of Asia Pacific
- 10.4 South America
  - 10.4.1 Brazil
  - 10.4.2 Argentina
  - 10.4.3 Colombia
  - 10.4.4 Chile
  - 10.4.5 Peru
  - 10.4.6 Rest of South America
- 10.5 Rest of the World (RoW)
  - 10.5.1 Middle East
    - 10.5.1.1 Saudi Arabia
    - 10.5.1.2 United Arab Emirates
    - 10.5.1.3 Qatar
    - 10.5.1.4 Israel
    - 10.5.1.5 Rest of Middle East
  - 10.5.2 Africa
    - 10.5.2.1 South Africa
    - 10.5.2.2 Egypt
    - 10.5.2.3 Morocco
    - 10.5.2.4 Rest of Africa

## **11 STRATEGIC MARKET INTELLIGENCE**

- 11.1 Industry Value Network and Supply Chain Assessment
- 11.2 White-Space and Opportunity Mapping
- 11.3 Product Evolution and Market Life Cycle Analysis
- 11.4 Channel, Distributor, and Go-to-Market Assessment

## **12 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES**

- 12.1 Mergers and Acquisitions
- 12.2 Partnerships, Alliances, and Joint Ventures
- 12.3 New Product Launches and Certifications
- 12.4 Capacity Expansion and Investments
- 12.5 Other Strategic Initiatives

## **13 COMPANY PROFILES**

- 13.1 Nestl? Purina PetCare
- 13.2 Mars Petcare
- 13.3 Ceva Sant? Animale
- 13.4 Zylkene (Vetoquinol)
- 13.5 ThunderShirt
- 13.6 Adaptil (Ceva)
- 13.7 Pet Naturals of Vermont
- 13.8 VetriScience Laboratories
- 13.9 Rescue Remedy Pets
- 13.10 HempMy Pet
- 13.11 Honest Paws
- 13.12 Bach Flower Remedies
- 13.13 PetHonesty
- 13.14 NaturVet
- 13.15 Only Natural Pet

## List Of Tables

### LIST OF TABLES

Table 1 Global Anxiety & Behaviour Support Products Market Outlook, By Region (2023-2034) (\$MN)

Table 2 Global Anxiety & Behaviour Support Products Market, By Product Type (2023–2034) (\$MN)

Table 3 Global Anxiety & Behaviour Support Products Market, By Calming Treats (2023–2034) (\$MN)

Table 4 Global Anxiety & Behaviour Support Products Market, By Supplements (2023–2034) (\$MN)

Table 5 Global Anxiety & Behaviour Support Products Market, By Anxiety Vests (2023–2034) (\$MN)

Table 6 Global Anxiety & Behaviour Support Products Market, By Pheromone Products (2023–2034) (\$MN)

Table 7 Global Anxiety & Behaviour Support Products Market, By Training Aids (2023–2034) (\$MN)

Table 8 Global Anxiety & Behaviour Support Products Market, By Toys & Enrichment Products (2023–2034) (\$MN)

Table 9 Global Anxiety & Behaviour Support Products Market, By Other Product Types (2023–2034) (\$MN)

Table 10 Global Anxiety & Behaviour Support Products Market, By Ingredient Type (2023–2034) (\$MN)

Table 11 Global Anxiety & Behaviour Support Products Market, By Herbal-Based (2023–2034) (\$MN)

Table 12 Global Anxiety & Behaviour Support Products Market, By CBD-Based (2023–2034) (\$MN)

Table 13 Global Anxiety & Behaviour Support Products Market, By Synthetic Compounds (2023–2034) (\$MN)

Table 14 Global Anxiety & Behaviour Support Products Market, By Vitamin & Mineral Blends (2023–2034) (\$MN)

Table 15 Global Anxiety & Behaviour Support Products Market, By Amino Acids (2023–2034) (\$MN)

Table 16 Global Anxiety & Behaviour Support Products Market, By Probiotics (2023–2034) (\$MN)

Table 17 Global Anxiety & Behaviour Support Products Market, By Other Ingredient Types (2023–2034) (\$MN)

Table 18 Global Anxiety & Behaviour Support Products Market, By Form (2023–2034)

(\$MN)

Table 19 Global Anxiety & Behaviour Support Products Market, By Chews & Tablets (2023–2034) (\$MN)

Table 20 Global Anxiety & Behaviour Support Products Market, By Powder (2023–2034) (\$MN)

Table 21 Global Anxiety & Behaviour Support Products Market, By Liquid (2023–2034) (\$MN)

Table 22 Global Anxiety & Behaviour Support Products Market, By Sprays (2023–2034) (\$MN)

Table 23 Global Anxiety & Behaviour Support Products Market, By Collars & Diffusers (2023–2034) (\$MN)

Table 24 Global Anxiety & Behaviour Support Products Market, By Wearables (2023–2034) (\$MN)

Table 25 Global Anxiety & Behaviour Support Products Market, By Other Forms (2023–2034) (\$MN)

Table 26 Global Anxiety & Behaviour Support Products Market, By Application (2023–2034) (\$MN)

Table 27 Global Anxiety & Behaviour Support Products Market, By Separation Anxiety (2023–2034) (\$MN)

Table 28 Global Anxiety & Behaviour Support Products Market, By Noise Phobia (2023–2034) (\$MN)

Table 29 Global Anxiety & Behaviour Support Products Market, By Aggression Management (2023–2034) (\$MN)

Table 30 Global Anxiety & Behaviour Support Products Market, By Travel Anxiety (2023–2034) (\$MN)

Table 31 Global Anxiety & Behaviour Support Products Market, By Training & Behaviour Correction (2023–2034) (\$MN)

Table 32 Global Anxiety & Behaviour Support Products Market, By General Stress Relief (2023–2034) (\$MN)

Table 33 Global Anxiety & Behaviour Support Products Market, By Other Applications (2023–2034) (\$MN)

Table 34 Global Anxiety & Behaviour Support Products Market, By End User (2023–2034) (\$MN)

Table 35 Global Anxiety & Behaviour Support Products Market, By Pet Owners (2023–2034) (\$MN)

Table 36 Global Anxiety & Behaviour Support Products Market, By Veterinary Clinics (2023–2034) (\$MN)

Table 37 Global Anxiety & Behaviour Support Products Market, By Pet Trainers (2023–2034) (\$MN)

Table 38 Global Anxiety & Behaviour Support Products Market, By Pet Specialty Stores (2023–2034) (\$MN)

Table 39 Global Anxiety & Behaviour Support Products Market, By Online Retailers (2023–2034) (\$MN)

Table 40 Global Anxiety & Behaviour Support Products Market, By Animal Shelters (2023–2034) (\$MN)

Table 41 Global Anxiety & Behaviour Support Products Market, By Other End Users (2023–2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) are also represented in the same manner as above.

## I would like to order

Product name: Anxiety & Behaviour Support Products Market Forecasts to 2034 – Global Analysis By Product Type (Calming Treats, Supplements, Anxiety Vests, Pheromone Products, Training Aids, Toys & Enrichment Products, Other Product Types), By Ingredient Type, By Form, By Application, By End User and By Geography

Product link: <https://marketpublishers.com/r/AD21B8E4B46FEN.html>

Price: US\$ 4,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/AD21B8E4B46FEN.html>