

Pet Behavioral Health Market Forecasts To 2034 - Global Analysis By Behavioral Condition (Anxiety & Stress, Separation Anxiety, Aggression & Reactivity, Fear & Phobias, Compulsive & Repetitive , Behaviors, Destructive Behavior, Inappropriate Elimination, Excessive Vocalization, Attention & Hyperactivity Disorders, Cognitive Dysfunction & Age-Related Behavioral Disorders and Socialization & Adaptation Problems), Intervention Type, Service Type, Pet Type, Product Type, Service Provider, Delivery Mode, Pet Age, Distribution Channel, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Pet Behavioral Health Market is accounted for \$3.0 billion in 2026 and is expected to reach \$5.3 billion by 2034 growing at a CAGR of 7.4% during the forecast period. The Pet Behavioral Health Market encompasses specialized solutions that address psychological, emotional, and behavioral issues affecting companion animals. The market covers veterinary behavioral assessments, counseling, behavior modification, training, calming products, supplements, pheromone-based solutions, pharmaceuticals, enrichment tools, and technology-enabled monitoring. Expansion is driven by rising companion-animal ownership, stronger awareness of pet emotional welfare, and growing expenditure on advanced veterinary services. Increasing recognition of anxiety, aggression, separation anxiety, compulsive behavior, destructive tendencies, and cognitive changes among aging pets is

generating demand for targeted interventions. Technological developments in remote consultations, behavioral tracking, smart devices, and individualized care are also creating new avenues for market development.

Market Dynamics:

Driver:

Increasing Awareness of Pet Mental and Emotional Well-Being

Greater recognition of psychological and emotional wellness in companion animals is strengthening the demand for behavioral health products and services. Owners are increasingly able to identify signs of stress, anxiety, fear, aggression, compulsive activity, and age-related cognitive changes. Veterinarians, professional trainers, animal welfare groups, and online information platforms are helping educate owners about behavioral conditions and the value of timely intervention. Better access to digital resources and remote behavioral guidance is also allowing more owners to understand potential problems and seek appropriate support. With behavioral well-being becoming an integral part of comprehensive pet health, demand for preventive care, behavioral assessment, and specialized interventions is expected to continue expanding.

Restraint:

High Cost of Specialized Behavioral Care

Expensive specialized behavioral services can limit the expansion of the PET BEHAVIORAL HEALTH Market. Professional behavioral assessments, veterinary consultations, therapy programs, medications, training sessions, and continuing care can create considerable financial burdens for pet owners, especially when behavioral problems require prolonged treatment. Access can become even more difficult when veterinary behavior specialists are primarily located in large cities, requiring owners in other areas to incur additional travel expenses. Cost-sensitive consumers may therefore choose basic training or readily available calming products instead of professional intervention. However, inexpensive alternatives may be insufficient for serious conditions, making treatment affordability and specialist accessibility important constraints on market adoption.

Opportunity:

Expansion of Behavioral Health Products in Emerging Markets

Developing economies present attractive expansion opportunities as companion-animal ownership, consumer purchasing power, veterinary capabilities, and awareness of pet

wellness continue to improve. Rapid urban development and closer owner-pet relationships may also increase recognition of stress and behavioral challenges. Companies can address these markets with affordable calming supplements, pheromone-based products, functional treats, training tools, online consultations, and educational initiatives. E-commerce can improve product availability where specialized physical retailers are limited. Collaboration with veterinary practices, trainers, pet stores, and animal welfare groups can strengthen awareness and adoption. Together, improving infrastructure, digital accessibility, and consumer knowledge can enable behavioral-health companies to enter new markets and expand their customer base.

Threat:

Economic Uncertainty and Reduced Discretionary Pet Spending

Economic instability can negatively influence spending on specialized companion-animal behavioral care. Owners may consider behavioral consultations, professional training, premium calming products, supplements, and continuing treatment programs less essential than urgent medical or veterinary expenses. During inflationary periods, economic downturns, or declines in household purchasing power, consumers may delay assessments, reduce purchases, or select cheaper alternatives. Higher-priced products and subscription-based behavioral services may face greater sensitivity to these changes. While many owners remain committed to pet welfare, financial constraints can alter priorities and purchasing behavior. Sustained economic uncertainty could therefore slow demand for premium behavioral-health solutions and create stronger challenges for companies operating in cost-sensitive consumer markets.

Covid-19 Impact:

COVID-19 produced both positive and negative effects on the PET BEHAVIORAL HEALTH Market. Lockdowns changed household routines and increased owner-pet interaction, while restrictions on exercise, socialization, and subsequent transitions back to normal schedules created behavioral challenges for certain animals. Dogs with existing separation-related problems were particularly vulnerable to worsening symptoms during lockdown periods. However, the pandemic also increased recognition of companion-animal emotional well-being and the importance of behavioral management. Research found that pet behavior varied across pandemic stages, demonstrating the importance of consistent routines and appropriate human-animal interaction. Consequently, COVID-19 accelerated awareness of behavioral health while temporarily affecting access to veterinary and behavioral services.

The Anxiety & Stress segment is expected to be the largest during the forecast period

The Anxiety & Stress segment is expected to account for the largest market share

during the forecast period, because anxiety and stress represent common behavioral concerns affecting companion animals. Pets may experience these conditions because of changes in household environments, separation from owners, unfamiliar situations, travel, loud sounds, altered routines, and other stressful circumstances. Increasing attention to pet emotional wellness is prompting owners to identify behavioral changes earlier and seek suitable support. Veterinary practitioners and behavioral specialists are increasingly utilizing training, calming interventions, nutritional supplements, pheromone-based solutions, and related approaches. The widespread relevance of anxiety and stress management across companion animals is expected to maintain the segment's leading market position.

The Online Retail segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Online Retail segment is predicted to witness the highest growth rate, driven by rising digital adoption, expanding e-commerce networks, and increasing demand for convenient pet-care purchasing options. Online channels allow owners to access diverse behavioral-health products, including calming supplements, pheromone solutions, training aids, and other specialized products from multiple brands. Features such as convenient delivery, product reviews, price comparisons, recurring subscriptions, and promotional offers can further influence purchasing decisions. Growing consumer confidence in online shopping and the increasing integration of digital technologies into pet care are strengthening this distribution channel. As accessibility and product availability improve, online retail is expected to expand rapidly during the forecast period.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, driven by widespread companion-animal ownership, substantial expenditure on veterinary care, and increasing recognition of pet psychological wellness. The region benefits from established veterinary facilities, professional behavioral specialists, training services, and advanced companion-animal healthcare infrastructure. Owners are increasingly seeking solutions for anxiety, stress, behavioral disorders, and cognitive concerns, supporting demand for therapeutic services, calming products, supplements, medications, and monitoring technologies. Strong e-commerce penetration, premium pet-care spending, and growing access to digital and remote behavioral services further enhance market development, helping North America maintain its dominant regional position.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by expanding companion-animal ownership, urbanization, improving household incomes, and increasing recognition of pet behavioral and emotional needs.

Consumers are showing greater interest in advanced veterinary care, behavioral assessment, professional training, calming supplements, and technology-enabled wellness solutions. Improvements in veterinary infrastructure and increasing access to specialized behavioral services are supporting market development. Rapid expansion of online retail is further improving the availability of behavioral-health products throughout the region. Growing pet humanization and increased expenditure on companion-animal wellness are expected to create strong momentum for regional market growth during the forecast period.

Key players in the market

Some of the key players in Pet Behavioral Health Market include Ceva Sant? Animale, Zoetis Inc., Elanco Animal Health, Vetoquinol S.A., Virbac S.A., Boehringer Ingelheim Animal Health, Nestl? Purina PetCare, Nutramax Laboratories, Zesty Paws, Garmon Corp., PetHonesty, VetriScience Laboratories, HomeoPet LLC, JES Biotech Co., Ltd., Sentry Pet Care, Radio Systems Corporation, Pet King Brands and NOW Foods.

Key Developments:

In August 2026, Elanco highlighted its ongoing partnership with Medical Mutts Service Dogs, an organization that rescues and trains shelter dogs to become service companions.

In March 2024, Ceva and Mitsui & Co. announced the creation of Ceva Bussan Animal Health, a joint venture in Japan. The companies described it as a strengthened strategic collaboration intended to accelerate innovation and market expansion.

Behavioral Conditions Covered:

Anxiety & Stress

Separation Anxiety

Aggression & Reactivity

Fear & Phobias

Compulsive & Repetitive Behaviors

Destructive Behavior

Inappropriate Elimination

Excessive Vocalization

Attention & Hyperactivity Disorders

Cognitive Dysfunction & Age-Related Behavioral Disorders

Socialization & Adaptation Problems

Intervention Types Covered:

Behavior Modification

Positive Reinforcement

Desensitization & Counterconditioning

Socialization Training

Environmental Enrichment

Relaxation & Calming Interventions

Obedience & Skills Training

Owner Education & Behavior Coaching

Service Types Covered:

Behavioral Assessment & Diagnosis

Behavioral Consultation

Behavioral Therapy

Behavioral Training

Medication Management

Behavioral Rehabilitation

Behavioral Monitoring & Follow-Up

Preventive Behavioral Wellness

Pet Types Covered:

Dogs

Cats

Horses

Birds

Small Mammals

Reptiles

Other Companion Animals

Product Types Covered:

Calming Supplements & Nutraceuticals

Calming Treats

Pheromone-Based Products

Behavioral Training Aids

Interactive & Enrichment Products

Cognitive Support Products

Anxiety-Relief Products

Behavioral Monitoring Devices

Behavioral Wearables

Service Providers Covered:

Veterinary Behaviorists

General Veterinary Practitioners

Veterinary Clinics & Hospitals

Certified Animal Behaviorists

Professional Pet Trainers

Animal Behavior Centers

Pet Wellness Centers

Digital Behavioral Health Providers

Delivery Modes Covered:

In-Person

At-Home

Teleconsultation

Online

Hybrid

Pet Ages Covered:

Puppies & Kittens

Young Adult Pets

Mature Adult Pets

Senior Pets

Distribution Channels Covered:

Veterinary Clinics & Hospitals

Pet Specialty Stores

Online Retail

Direct-to-Consumer

Retail Pharmacies

Supermarkets & Hypermarkets

End Users Covered:

Pet Owners

Veterinary Practices

Animal Shelters & Rescue Organizations

Pet Training Facilities

Pet Boarding & Daycare Facilities

Breeders

Animal Welfare Organizations

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 PET BEHAVIORAL HEALTH MARKET, BY BEHAVIORAL CONDITION

- 5.1 Anxiety & Stress
- 5.2 Separation Anxiety
- 5.3 Aggression & Reactivity
- 5.4 Fear & Phobias
- 5.5 Compulsive & Repetitive Behaviors
- 5.6 Destructive Behavior
- 5.7 Inappropriate Elimination
- 5.8 Excessive Vocalization
- 5.9 Attention & Hyperactivity Disorders
- 5.10 Cognitive Dysfunction & Age-Related Behavioral Disorders
- 5.11 Socialization & Adaptation Problems

6 GLOBAL PET BEHAVIORAL HEALTH MARKET, BY INTERVENTION TYPE

- 6.1 Behavior Modification
- 6.2 Positive Reinforcement
- 6.3 Desensitization & Counterconditioning
- 6.4 Socialization Training
- 6.5 Environmental Enrichment
- 6.6 Relaxation & Calming Interventions
- 6.7 Obedience & Skills Training
- 6.8 Owner Education & Behavior Coaching

7 GLOBAL PET BEHAVIORAL HEALTH MARKET, BY SERVICE TYPE

- 7.1 Behavioral Assessment & Diagnosis
- 7.2 Behavioral Consultation
- 7.3 Behavioral Therapy
- 7.4 Behavioral Training
- 7.5 Medication Management
- 7.6 Behavioral Rehabilitation
- 7.7 Behavioral Monitoring & Follow-Up
- 7.8 Preventive Behavioral Wellness

8 GLOBAL PET BEHAVIORAL HEALTH MARKET, BY PET TYPE

- 8.1 Dogs
- 8.2 Cats
- 8.3 Horses
- 8.4 Birds
- 8.5 Small Mammals
- 8.6 Reptiles
- 8.7 Other Companion Animals

9 GLOBAL PET BEHAVIORAL HEALTH MARKET, BY PRODUCT TYPE

- 9.1 Calming Supplements & Nutraceuticals
- 9.2 Calming Treats
- 9.3 Pheromone-Based Products
- 9.4 Behavioral Training Aids
- 9.5 Interactive & Enrichment Products
- 9.6 Cognitive Support Products
- 9.7 Anxiety-Relief Products
- 9.8 Behavioral Monitoring Devices
- 9.9 Behavioral Wearables

10 GLOBAL PET BEHAVIORAL HEALTH MARKET, BY SERVICE PROVIDER

- 10.1 Veterinary Behaviorists
- 10.2 General Veterinary Practitioners
- 10.3 Veterinary Clinics & Hospitals
- 10.4 Certified Animal Behaviorists
- 10.5 Professional Pet Trainers
- 10.6 Animal Behavior Centers
- 10.7 Pet Wellness Centers
- 10.8 Digital Behavioral Health Providers

11 GLOBAL PET BEHAVIORAL HEALTH MARKET, BY DELIVERY MODE

- 11.1 In-Person
- 11.2 At-Home
- 11.3 Teleconsultation

11.4 Online

11.5 Hybrid

12 GLOBAL PET BEHAVIORAL HEALTH MARKET, BY PET AGE

12.1 Puppies & Kittens

12.2 Young Adult Pets

12.3 Mature Adult Pets

12.4 Senior Pets

13 GLOBAL PET BEHAVIORAL HEALTH MARKET, BY DISTRIBUTION CHANNEL

13.1 Veterinary Clinics & Hospitals

13.2 Pet Specialty Stores

13.3 Online Retail

13.4 Direct-to-Consumer

13.5 Retail Pharmacies

13.6 Supermarkets & Hypermarkets

14 GLOBAL PET BEHAVIORAL HEALTH MARKET, BY END USER

14.1 Pet Owners

14.2 Veterinary Practices

14.3 Animal Shelters & Rescue Organizations

14.4 Pet Training Facilities

14.5 Pet Boarding & Daycare Facilities

14.6 Breeders

14.7 Animal Welfare Organizations

15 GLOBAL PET BEHAVIORAL HEALTH MARKET, BY GEOGRAPHY

15.1 North America

15.1.1 United States

15.1.2 Canada

15.1.3 Mexico

15.2 Europe

15.2.1 United Kingdom

15.2.2 Germany

15.2.3 France

- 15.2.4 Italy
- 15.2.5 Spain
- 15.2.6 Netherlands
- 15.2.7 Belgium
- 15.2.8 Sweden
- 15.2.9 Switzerland
- 15.2.10 Poland
- 15.2.11 Rest of Europe
- 15.3 Asia Pacific
 - 15.3.1 China
 - 15.3.2 Japan
 - 15.3.3 India
 - 15.3.4 South Korea
 - 15.3.5 Australia
 - 15.3.6 Indonesia
 - 15.3.7 Thailand
 - 15.3.8 Malaysia
 - 15.3.9 Singapore
 - 15.3.10 Vietnam
 - 15.3.11 Rest of Asia Pacific
- 15.4 South America
 - 15.4.1 Brazil
 - 15.4.2 Argentina
 - 15.4.3 Colombia
 - 15.4.4 Chile
 - 15.4.5 Peru
 - 15.4.6 Rest of South America
- 15.5 Rest of the World (RoW)
 - 15.5.1 Middle East
 - 15.5.1.1 Saudi Arabia
 - 15.5.1.2 United Arab Emirates
 - 15.5.1.3 Qatar
 - 15.5.1.4 Israel
 - 15.5.1.5 Rest of Middle East
 - 15.5.2 Africa
 - 15.5.2.1 South Africa
 - 15.5.2.2 Egypt
 - 15.5.2.3 Morocco
 - 15.5.2.4 Rest of Africa

16 STRATEGIC MARKET INTELLIGENCE

- 16.1 Industry Value Network and Supply Chain Assessment
- 16.2 White-Space and Opportunity Mapping
- 16.3 Product Evolution and Market Life Cycle Analysis
- 16.4 Channel, Distributor, and Go-to-Market Assessment

17 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES

- 17.1 Mergers and Acquisitions
- 17.2 Partnerships, Alliances, and Joint Ventures
- 17.3 New Product Launches and Certifications
- 17.4 Capacity Expansion and Investments
- 17.5 Other Strategic Initiatives

18 COMPANY PROFILES

- 18.1 Ceva Santé Animale
- 18.2 Zoetis Inc.
- 18.3 Elanco Animal Health
- 18.4 Vetoquinol S.A.
- 18.5 Virbac S.A.
- 18.6 Boehringer Ingelheim Animal Health
- 18.7 Nestlé Purina PetCare
- 18.8 Nutramax Laboratories
- 18.9 Zesty Paws
- 18.10 Garmon Corp.
- 18.11 PetHonesty
- 18.12 VetriScience Laboratories
- 18.13 HomeoPet LLC
- 18.14 JES Biotech Co., Ltd.
- 18.15 Sentry Pet Care
- 18.16 Radio Systems Corporation
- 18.17 Pet King Brands
- 18.18 NOW Foods

List Of Tables

LIST OF TABLES

Table 1 Global Pet Behavioral Health Market Outlook, By Region (2023-2034) (\$MN)

Table 2 Global Pet Behavioral Health Market Outlook, By Behavioral Condition (2023-2034) (\$MN)

Table 3 Global Pet Behavioral Health Market Outlook, By Anxiety & Stress (2023-2034) (\$MN)

Table 4 Global Pet Behavioral Health Market Outlook, By Separation Anxiety (2023-2034) (\$MN)

Table 5 Global Pet Behavioral Health Market Outlook, By Aggression & Reactivity (2023-2034) (\$MN)

Table 6 Global Pet Behavioral Health Market Outlook, By Fear & Phobias (2023-2034) (\$MN)

Table 7 Global Pet Behavioral Health Market Outlook, By Compulsive & Repetitive Behaviors (2023-2034) (\$MN)

Table 8 Global Pet Behavioral Health Market Outlook, By Destructive Behavior (2023-2034) (\$MN)

Table 9 Global Pet Behavioral Health Market Outlook, By Inappropriate Elimination (2023-2034) (\$MN)

Table 10 Global Pet Behavioral Health Market Outlook, By Excessive Vocalization (2023-2034) (\$MN)

Table 11 Global Pet Behavioral Health Market Outlook, By Attention & Hyperactivity Disorders (2023-2034) (\$MN)

Table 12 Global Pet Behavioral Health Market Outlook, By Cognitive Dysfunction & Age-Related Behavioral Disorders (2023-2034) (\$MN)

Table 13 Global Pet Behavioral Health Market Outlook, By Socialization & Adaptation Problems (2023-2034) (\$MN)

Table 14 Global Pet Behavioral Health Market Outlook, By Intervention Type (2023-2034) (\$MN)

Table 15 Global Pet Behavioral Health Market Outlook, By Behavior Modification (2023-2034) (\$MN)

Table 16 Global Pet Behavioral Health Market Outlook, By Positive Reinforcement (2023-2034) (\$MN)

Table 17 Global Pet Behavioral Health Market Outlook, By Desensitization & Counterconditioning (2023-2034) (\$MN)

Table 18 Global Pet Behavioral Health Market Outlook, By Socialization Training (2023-2034) (\$MN)

Table 19 Global Pet Behavioral Health Market Outlook, By Environmental Enrichment (2023-2034) (\$MN)

Table 20 Global Pet Behavioral Health Market Outlook, By Relaxation & Calming Interventions (2023-2034) (\$MN)

Table 21 Global Pet Behavioral Health Market Outlook, By Obedience & Skills Training (2023-2034) (\$MN)

Table 22 Global Pet Behavioral Health Market Outlook, By Owner Education & Behavior Coaching (2023-2034) (\$MN)

Table 23 Global Pet Behavioral Health Market Outlook, By Service Type (2023-2034) (\$MN)

Table 24 Global Pet Behavioral Health Market Outlook, By Behavioral Assessment & Diagnosis (2023-2034) (\$MN)

Table 25 Global Pet Behavioral Health Market Outlook, By Behavioral Consultation (2023-2034) (\$MN)

Table 26 Global Pet Behavioral Health Market Outlook, By Behavioral Therapy (2023-2034) (\$MN)

Table 27 Global Pet Behavioral Health Market Outlook, By Behavioral Training (2023-2034) (\$MN)

Table 28 Global Pet Behavioral Health Market Outlook, By Medication Management (2023-2034) (\$MN)

Table 29 Global Pet Behavioral Health Market Outlook, By Behavioral Rehabilitation (2023-2034) (\$MN)

Table 30 Global Pet Behavioral Health Market Outlook, By Behavioral Monitoring & Follow-Up (2023-2034) (\$MN)

Table 31 Global Pet Behavioral Health Market Outlook, By Preventive Behavioral Wellness (2023-2034) (\$MN)

Table 32 Global Pet Behavioral Health Market Outlook, By Pet Type (2023-2034) (\$MN)

Table 33 Global Pet Behavioral Health Market Outlook, By Dogs (2023-2034) (\$MN)

Table 34 Global Pet Behavioral Health Market Outlook, By Cats (2023-2034) (\$MN)

Table 35 Global Pet Behavioral Health Market Outlook, By Horses (2023-2034) (\$MN)

Table 36 Global Pet Behavioral Health Market Outlook, By Birds (2023-2034) (\$MN)

Table 37 Global Pet Behavioral Health Market Outlook, By Small Mammals (2023-2034) (\$MN)

Table 38 Global Pet Behavioral Health Market Outlook, By Reptiles (2023-2034) (\$MN)

Table 39 Global Pet Behavioral Health Market Outlook, By Other Companion Animals (2023-2034) (\$MN)

Table 40 Global Pet Behavioral Health Market Outlook, By Product Type (2023-2034) (\$MN)

Table 41 Global Pet Behavioral Health Market Outlook, By Calming Supplements &

Nutraceuticals (2023-2034) (\$MN)

Table 42 Global Pet Behavioral Health Market Outlook, By Calming Treats (2023-2034) (\$MN)

Table 43 Global Pet Behavioral Health Market Outlook, By Pheromone-Based Products (2023-2034) (\$MN)

Table 44 Global Pet Behavioral Health Market Outlook, By Behavioral Training Aids (2023-2034) (\$MN)

Table 45 Global Pet Behavioral Health Market Outlook, By Interactive & Enrichment Products (2023-2034) (\$MN)

Table 46 Global Pet Behavioral Health Market Outlook, By Cognitive Support Products (2023-2034) (\$MN)

Table 47 Global Pet Behavioral Health Market Outlook, By Anxiety-Relief Products (2023-2034) (\$MN)

Table 48 Global Pet Behavioral Health Market Outlook, By Behavioral Monitoring Devices (2023-2034) (\$MN)

Table 49 Global Pet Behavioral Health Market Outlook, By Behavioral Wearables (2023-2034) (\$MN)

Table 50 Global Pet Behavioral Health Market Outlook, By Service Provider (2023-2034) (\$MN)

Table 51 Global Pet Behavioral Health Market Outlook, By Veterinary Behaviorists (2023-2034) (\$MN)

Table 52 Global Pet Behavioral Health Market Outlook, By General Veterinary Practitioners (2023-2034) (\$MN)

Table 53 Global Pet Behavioral Health Market Outlook, By Veterinary Clinics & Hospitals (2023-2034) (\$MN)

Table 54 Global Pet Behavioral Health Market Outlook, By Certified Animal Behaviorists (2023-2034) (\$MN)

Table 55 Global Pet Behavioral Health Market Outlook, By Professional Pet Trainers (2023-2034) (\$MN)

Table 56 Global Pet Behavioral Health Market Outlook, By Animal Behavior Centers (2023-2034) (\$MN)

Table 57 Global Pet Behavioral Health Market Outlook, By Pet Wellness Centers (2023-2034) (\$MN)

Table 58 Global Pet Behavioral Health Market Outlook, By Digital Behavioral Health Providers (2023-2034) (\$MN)

Table 59 Global Pet Behavioral Health Market Outlook, By Delivery Mode (2023-2034) (\$MN)

Table 60 Global Pet Behavioral Health Market Outlook, By In-Person (2023-2034) (\$MN)

Table 61 Global Pet Behavioral Health Market Outlook, By At-Home (2023-2034) (\$MN)

Table 62 Global Pet Behavioral Health Market Outlook, By Teleconsultation (2023-2034) (\$MN)

Table 63 Global Pet Behavioral Health Market Outlook, By Online (2023-2034) (\$MN)

Table 64 Global Pet Behavioral Health Market Outlook, By Hybrid (2023-2034) (\$MN)

Table 65 Global Pet Behavioral Health Market Outlook, By Pet Age (2023-2034) (\$MN)

Table 66 Global Pet Behavioral Health Market Outlook, By Puppies & Kittens (2023-2034) (\$MN)

Table 67 Global Pet Behavioral Health Market Outlook, By Young Adult Pets (2023-2034) (\$MN)

Table 68 Global Pet Behavioral Health Market Outlook, By Mature Adult Pets (2023-2034) (\$MN)

Table 69 Global Pet Behavioral Health Market Outlook, By Senior Pets (2023-2034) (\$MN)

Table 70 Global Pet Behavioral Health Market Outlook, By Distribution Channel (2023-2034) (\$MN)

Table 71 Global Pet Behavioral Health Market Outlook, By Veterinary Clinics & Hospitals (2023-2034) (\$MN)

Table 72 Global Pet Behavioral Health Market Outlook, By Pet Specialty Stores (2023-2034) (\$MN)

Table 73 Global Pet Behavioral Health Market Outlook, By Online Retail (2023-2034) (\$MN)

Table 74 Global Pet Behavioral Health Market Outlook, By Direct-to-Consumer (2023-2034) (\$MN)

Table 75 Global Pet Behavioral Health Market Outlook, By Retail Pharmacies (2023-2034) (\$MN)

Table 76 Global Pet Behavioral Health Market Outlook, By Supermarkets & Hypermarkets (2023-2034) (\$MN)

Table 77 Global Pet Behavioral Health Market Outlook, By End User (2023-2034) (\$MN)

Table 78 Global Pet Behavioral Health Market Outlook, By Pet Owners (2023-2034) (\$MN)

Table 79 Global Pet Behavioral Health Market Outlook, By Veterinary Practices (2023-2034) (\$MN)

Table 80 Global Pet Behavioral Health Market Outlook, By Animal Shelters & Rescue Organizations (2023-2034) (\$MN)

Table 81 Global Pet Behavioral Health Market Outlook, By Pet Training Facilities (2023-2034) (\$MN)

Table 82 Global Pet Behavioral Health Market Outlook, By Pet Boarding & Daycare

Facilities (2023-2034) (\$MN)

Table 83 Global Pet Behavioral Health Market Outlook, By Breeders (2023-2034) (\$MN)

Table 84 Global Pet Behavioral Health Market Outlook, By Animal Welfare
Organizations (2023-2034) (\$MN)

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

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