

# **Pet-Tech Regulatory and Compliance Consulting Market Forecasts to 2034 – Global Analysis By Service Type (Regulatory Advisory Services, Compliance Auditing & Certification, Risk Assessment & Mitigation, Policy & Standards Development and Training & Capacity Building), Regulatory Domain, Consulting Model, Client Type and By Geography**

<https://marketpublishers.com/r/PC8316D43632EN.html>

Date: June 2026

Pages: 200

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

ID: PC8316D43632EN

## **Abstracts**

According to Statistics MRC, the Global Pet-Tech Regulatory and Compliance Consulting Market is accounted for \$0.6 billion in 2026 and is expected to reach \$2.1 billion by 2034 growing at a CAGR of 16.0% during the forecast period. Consulting in Pet-Tech Regulatory and Compliance services helps organizations in the pet technology industry adhere to evolving legal frameworks and operational standards. These experts guide companies through animal welfare requirements, data protection regulations, veterinary compliance rules, and product safety certifications. They assess jurisdiction-specific laws, detect compliance gaps, and design effective mitigation and approval strategies. The consulting support includes assisting firms with licensing, regulatory filings, audits, and product authorization processes. With rapid expansion in pet-tech solutions, such advisory services are essential for minimizing legal exposure and ensuring that innovations in digital pet care remain safe, responsible, and fully compliant with regulations.

According to the American Pet Products Association (APPA), U.S. pet industry expenditures reached USD 136.8 billion in 2022, with veterinary care and product sales accounting for a significant share. This scale drives compliance requirements for connected health devices and tele-vet platforms.

## **Market Dynamics:**

### **Driver:**

#### **Rising regulatory complexity in pet-tech**

Demand for pet-tech compliance consulting is rising due to the growing complexity of regulations related to animal welfare, digital pet health solutions, and consumer protection laws. Authorities in various regions are enforcing stricter compliance requirements for connected pet devices, telemedicine platforms, and data-driven services. Businesses operating across multiple jurisdictions face challenges in aligning with diverse legal standards. Consulting firms assist in interpreting regulatory changes, minimizing legal exposure, and securing approvals efficiently. As innovation in the pet-tech sector expands, regulatory fragmentation increases, creating strong demand for experts who ensure lawful operations, product integrity, and ethical compliance across global markets.

### **Restraint:**

#### **High cost of compliance consulting services**

Expensive compliance and regulatory consulting services act as a major barrier for the pet-tech consulting industry. Smaller firms and emerging startups often lack the financial capacity to hire expert advisors who specialize in complex regulatory environments. These services typically include legal assessments, certification support, audits, and ongoing compliance tracking, all of which contribute to high operational expenses. Many early-stage pet-tech companies operate under tight budgets and may postpone or reduce spending on compliance activities. This hesitation can expose them to legal challenges and restrict their ability to scale or introduce innovative pet-care technologies efficiently.

### **Opportunity:**

#### **Increasing adoption of tele-veterinary services**

The rising popularity of tele-veterinary services creates significant opportunities for compliance consulting providers. Digital platforms offering remote pet consultations and online diagnosis must comply with healthcare regulations, communication laws, and data protection requirements. Businesses in this sector require assistance in obtaining

licenses, meeting legal obligations, and ensuring ethical practices. Consulting firms support them by designing compliance frameworks, handling regulatory approvals, and minimizing legal risks. As tele-vet services expand across regions, regulatory complexity increases, strengthening the need for expert advisory support. This trend positions compliance consulting as an essential component in ensuring safe, lawful, and effective digital veterinary healthcare delivery.

Threat:

Increasing regulatory uncertainty

Frequent changes and uncertainty in regulatory frameworks represent a significant threat to the pet-tech compliance consulting industry. Laws governing animal welfare, digital health services, and data privacy are regularly updated, making it difficult for firms to maintain consistent advisory practices. Consulting providers must continuously adjust their knowledge and strategies, increasing operational complexity. Companies relying on these services struggle to develop stable long-term plans due to shifting compliance requirements. This unpredictability can slow product approvals and raise legal risks for businesses. Overall, unstable and evolving regulations create operational challenges and hinder steady growth within the compliance consulting market.

Covid-19 Impact:

The COVID-19 crisis had a major influence on the pet-tech regulatory and compliance consulting sector by speeding up the shift toward digital pet-care solutions. Restrictions and lockdowns boosted the use of online veterinary services, telehealth platforms, and remote pet monitoring tools, all requiring immediate regulatory support. Businesses encountered new compliance challenges involving data protection, digital healthcare rules, and licensing requirements. Consulting firms became essential in guiding companies through rapidly changing emergency regulations and approval processes. Although regulatory delays and operational disruptions occurred during the pandemic, the overall outcome was increased long-term reliance on compliance consulting within the growing pet-tech industry.

The compliance auditing & certification segment is expected to be the largest during the forecast period

The compliance auditing & certification segment is expected to account for the largest market share during the forecast period because it plays a key role in ensuring

companies follow required legal and industry standards. Businesses in this sector must comply with regulations concerning animal care, digital health solutions, data protection, and product safety before they can operate or launch offerings. Auditing processes verify adherence to these rules, while certification provides formal approval and enhances market credibility. This service is essential for both new and established companies, as it supports regulatory approval, builds customer trust, and enables smooth market entry, making it the most significant segment in the industry.

The pet-tech startups segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the pet-tech startups segment is predicted to witness the highest growth rate due to their rapid expansion and need for expert guidance. These emerging companies frequently develop innovative technologies like AI-based pet care systems, connected devices, and online veterinary services, all of which require strict regulatory adherence. Since most startups lack dedicated compliance teams, they rely heavily on consulting firms for approvals, certifications, and legal risk management. Their expansion into global markets also exposes them to varied regulatory environments, increasing dependency on advisory services and driving the fastest growth among all market segments.

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

During the forecast period, the North America region is expected to hold the largest market share because of its highly developed pet-tech industry, strong legal framework, and widespread use of digital pet-care technologies. The region has a large population of pet owners who actively adopt telehealth services, smart pet devices, and health monitoring systems, increasing the need for regulatory support. Well-established consulting companies and structured regulatory authorities further enhance market development. Strict rules related to animal welfare, data protection, and medical devices also drive continuous demand for compliance services. Additionally, strong investments and the presence of major industry participants reinforce North America's leading market position.

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

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by rapid urban growth, increasing pet ownership, and expanding digital pet-care adoption. Countries like China, India, Japan, and South Korea are

experiencing strong demand for tele-veterinary services, smart pet devices, and online care platforms. At the same time, governments are strengthening regulatory systems, which increase the need for compliance consulting support. The rising number of startups and growing foreign investments in the pet-tech sector further boost market expansion. These combined factors make Asia-Pacific the fastest-growing regional market.

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

Some of the key players in Pet-Tech Regulatory and Compliance Consulting Market include BSM Partners, Norton Rose Fulbright, Burdock Group, Knudsen&CRC, knoell, EpiMundi, Diamond Animal Health, Ashbury Global, EnviroVet, Cambridge PetTech, SM Regulatory Solutions, Ceva Sante Animale, Merck Animal Health, Boehringer Ingelheim Animal Health and Zoetis.

### **Key Developments:**

In November 2025, Zoetis Inc and Wrangler National Finals Rodeo (NFR), has again provided Fluvac Innovator® EHV-4/1 vaccines to all participating horses in support of the NFR's biosecurity protocols. The vaccine sponsorship is part of Zoetis' continued commitment to equine health and its ongoing partnership with the NFR. Doses were distributed to participants in October to ensure proper protection and compliance with the event's vaccination timelines and biosecurity requirements.

In May 2025, Merck Animal Health and AmacaThera announce collaboration in animal health. Built upon AmacaThera's unique hydrogel platform technology, AmacaGel™, products developed by AmacaThera are designed to enhance the sustained delivery of therapeutic agents with a single injection, potentially revolutionizing animal care and welfare in veterinary medicine.

### **Service Types Covered:**

Regulatory Advisory Services

Compliance Auditing & Certification

Risk Assessment & Mitigation

Policy & Standards Development

## Training & Capacity Building

### Regulatory Domains Covered:

Data Privacy & Cybersecurity

Veterinary Medical Device Regulations

Pet Insurance & Financial Compliance

Telehealth & Digital Veterinary Standards

Environmental & Sustainability Compliance

### Consulting Models Covered:

Project-Based Consulting

Retainer & Subscription Consulting

On-Demand Advisory

End-to-End Compliance Management

### Client Types Covered:

Pet-Tech Startups

Established Pet-Care Enterprises

Veterinary Clinics & Hospitals

Insurance & Financial Platforms

Government & Policy Bodies

## 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 TECH REGULATORY AND COMPLIANCE CONSULTING MARKET, BY SERVICE TYPE**

- 5.1 Regulatory Advisory Services
- 5.2 Compliance Auditing & Certification
- 5.3 Risk Assessment & Mitigation
- 5.4 Policy & Standards Development
- 5.5 Training & Capacity Building

## **6 GLOBAL PET TECH REGULATORY AND COMPLIANCE CONSULTING MARKET, BY REGULATORY DOMAIN**

- 6.1 Data Privacy & Cybersecurity
- 6.2 Veterinary Medical Device Regulations
- 6.3 Pet Insurance & Financial Compliance
- 6.4 Telehealth & Digital Veterinary Standards
- 6.5 Environmental & Sustainability Compliance

## **7 GLOBAL PET TECH REGULATORY AND COMPLIANCE CONSULTING MARKET, BY CONSULTING MODEL**

- 7.1 Project-Based Consulting
- 7.2 Retainer & Subscription Consulting
- 7.3 On-Demand Advisory
- 7.4 End-to-End Compliance Management

## **8 GLOBAL PET TECH REGULATORY AND COMPLIANCE CONSULTING MARKET, BY CLIENT TYPE**

- 8.1 Pet-Tech Startups
- 8.2 Established Pet-Care Enterprises
- 8.3 Veterinary Clinics & Hospitals
- 8.4 Insurance & Financial Platforms
- 8.5 Government & Policy Bodies

## **9 GLOBAL PET TECH REGULATORY AND COMPLIANCE CONSULTING MARKET, BY GEOGRAPHY**

### 9.1 North America

9.1.1 United States

9.1.2 Canada

9.1.3 Mexico

### 9.2 Europe

9.2.1 United Kingdom

9.2.2 Germany

9.2.3 France

9.2.4 Italy

9.2.5 Spain

9.2.6 Netherlands

9.2.7 Belgium

9.2.8 Sweden

9.2.9 Switzerland

9.2.10 Poland

9.2.11 Rest of Europe

### 9.3 Asia Pacific

9.3.1 China

9.3.2 Japan

9.3.3 India

9.3.4 South Korea

9.3.5 Australia

9.3.6 Indonesia

9.3.7 Thailand

9.3.8 Malaysia

9.3.9 Singapore

9.3.10 Vietnam

9.3.11 Rest of Asia Pacific

### 9.4 South America

9.4.1 Brazil

9.4.2 Argentina

9.4.3 Colombia

9.4.4 Chile

9.4.5 Peru

9.4.6 Rest of South America

### 9.5 Rest of the World (RoW)

- 9.5.1 Middle East
  - 9.5.1.1 Saudi Arabia
  - 9.5.1.2 United Arab Emirates
  - 9.5.1.3 Qatar
  - 9.5.1.4 Israel
  - 9.5.1.5 Rest of Middle East
- 9.5.2 Africa
  - 9.5.2.1 South Africa
  - 9.5.2.2 Egypt
  - 9.5.2.3 Morocco
  - 9.5.2.4 Rest of Africa

## **10 STRATEGIC MARKET INTELLIGENCE**

- 10.1 Industry Value Network and Supply Chain Assessment
- 10.2 White-Space and Opportunity Mapping
- 10.3 Product Evolution and Market Life Cycle Analysis
- 10.4 Channel, Distributor, and Go-to-Market Assessment

## **11 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES**

- 11.1 Mergers and Acquisitions
- 11.2 Partnerships, Alliances, and Joint Ventures
- 11.3 New Product Launches and Certifications
- 11.4 Capacity Expansion and Investments
- 11.5 Other Strategic Initiatives

## **12 COMPANY PROFILES**

- 12.1 BSM Partners
- 12.2 Norton Rose Fulbright
- 12.3 Burdock Group
- 12.4 Knudsen&CRC
- 12.5 knoell
- 12.6 EpiMundi
- 12.7 Diamond Animal Health
- 12.8 Ashbury Global
- 12.9 EnviroVet
- 12.10 Cambridge PetTech

- 12.11 SM Regulatory Solutions
- 12.12 Ceva Sante Animale
- 12.13 Merck Animal Health
- 12.14 Boehringer Ingelheim Animal Health
- 12.15 Zoetis

## List Of Tables

### LIST OF TABLES

Table 1 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Region (2023-2034) (\$MN)

Table 2 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Service Type (2023-2034) (\$MN)

Table 3 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Regulatory Advisory Services (2023-2034) (\$MN)

Table 4 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Compliance Auditing & Certification (2023-2034) (\$MN)

Table 5 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Risk Assessment & Mitigation (2023-2034) (\$MN)

Table 6 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Policy & Standards Development (2023-2034) (\$MN)

Table 7 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Training & Capacity Building (2023-2034) (\$MN)

Table 8 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Regulatory Domain (2023-2034) (\$MN)

Table 9 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Data Privacy & Cybersecurity (2023-2034) (\$MN)

Table 10 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Veterinary Medical Device Regulations (2023-2034) (\$MN)

Table 11 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Pet Insurance & Financial Compliance (2023-2034) (\$MN)

Table 12 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Telehealth & Digital Veterinary Standards (2023-2034) (\$MN)

Table 13 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Environmental & Sustainability Compliance (2023-2034) (\$MN)

Table 14 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Consulting Model (2023-2034) (\$MN)

Table 15 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Project-Based Consulting (2023-2034) (\$MN)

Table 16 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Retainer & Subscription Consulting (2023-2034) (\$MN)

Table 17 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By On-Demand Advisory (2023-2034) (\$MN)

Table 18 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By

End-to-End Compliance Management (2023-2034) (\$MN)

Table 19 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Client Type (2023-2034) (\$MN)

Table 20 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Pet-Tech Startups (2023-2034) (\$MN)

Table 21 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Established Pet-Care Enterprises (2023-2034) (\$MN)

Table 22 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Veterinary Clinics & Hospitals (2023-2034) (\$MN)

Table 23 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Insurance & Financial Platforms (2023-2034) (\$MN)

Table 24 Global Pet Tech Regulatory and Compliance Consulting Market Outlook, By Government & Policy Bodies (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.

## I would like to order

Product name: Pet-Tech Regulatory and Compliance Consulting Market Forecasts to 2034 – Global Analysis By Service Type (Regulatory Advisory Services, Compliance Auditing & Certification, Risk Assessment & Mitigation, Policy & Standards Development and Training & Capacity Building), Regulatory Domain, Consulting Model, Client Type and By Geography

Product link: <https://marketpublishers.com/r/PC8316D43632EN.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/PC8316D43632EN.html>