

Pet Wellness & Behavioral Tech Market Forecasts to 2032 – Global Analysis By Product (Wearable Devices, Non-Wearable Devices and Software Platforms), Animal Type, Technology, Application, End User and By Geography

<https://marketpublishers.com/r/P79BFDE8A7C1EN.html>

Date: April 2025

Pages: 200

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

ID: P79BFDE8A7C1EN

Abstracts

According to Statistics MRC, the Global Pet Wellness & Behavioral Tech Market is accounted for \$14.8 billion in 2025 and is expected to reach \$44.2 billion by 2032 growing at a CAGR of 16.9% during the forecast period. Pet Wellness & Behavioral Tech refers to a specialized segment of the pet care industry that leverages technology to monitor, enhance, and support the physical and psychological well-being of pets. This field encompasses devices, software, and platforms that track activity, nutrition, and vital signs, as well as tools that address behavioral challenges such as anxiety, aggression, or cognitive decline. By combining data-driven insights with behavioral science, these technologies empower pet owners and professionals to provide personalized care, improve quality of life, and strengthen the human-animal bond. It represents a convergence of health, technology, and compassionate pet management.

Market Dynamics:

Driver:

Rising Pet Humanization

Rising pet humanization is a transformative force driving the Pet Wellness & Behavioral Tech market. As pets are increasingly treated as family, demand for personalized health monitoring, emotional support tools, and behavior-modifying technologies has surged. Owners seek solutions that mirror human wellness standards—smart wearables, anxiety-

reducing devices, and telehealth platforms. This emotional shift fuels innovation and spending, encouraging tech providers to develop empathetic, data-driven products that enhance pet well-being and deepen the human-animal bond across global markets.

Restraint:

High Upfront Costs

High upfront costs act as a significant barrier in the Pet Wellness & Behavioral Tech Market, limiting adoption among smaller pet owners and budget-conscious consumers. Expensive devices and subscription services discourage widespread usage, slowing market growth. Startups and smaller companies struggle to compete against established brands with deeper pockets. Consequently, innovation diffusion is hindered, and potential customers may postpone or avoid investment, stalling overall market expansion and accessibility.

Opportunity:

Technological Advancements

Technological advancements are revolutionizing the market by enabling smarter, more personalized care solutions. Innovations in AI, IoT, and biosensors allow real-time tracking of pet health, behavior, and emotional states, empowering owners with actionable insights. Mobile integration and cloud-based platforms enhance accessibility and engagement, while predictive analytics support early intervention and preventive care. These breakthroughs are driving market growth by elevating pet well-being, improving veterinary outcomes, and fostering deeper human-animal connections through data-driven, compassionate technology.

Threat:

Data Privacy Concerns

Data privacy concerns significantly hinder the growth of the Pet Wellness & Behavioral Tech market, as pet owners grow wary of sharing sensitive information about themselves and their pets. Fear of data breaches, misuse of behavioral insights, and lack of clear regulatory protections reduce adoption of smart collars, monitoring apps, and AI-driven platforms. This mistrust slows market expansion, limits innovation, and compels companies to invest heavily in compliance rather than product development.

Covid-19 Impact

The COVID-19 pandemic catalyzed a surge in pet ownership and accelerated digital adoption across the pet care ecosystem. Lockdowns and remote work heightened emotional reliance on pets, driving demand for wellness monitoring and behavioral support tools. Tele-veterinary services and app-based training gained traction, while supply chain disruptions temporarily constrained device availability. Post-pandemic, the market continues to benefit from sustained pet companionship trends and a heightened focus on preventive health, solidifying tech's role in long-term pet care strategies.

The GPS technology segment is expected to be the largest during the forecast period

The GPS technology segment is expected to account for the largest market share during the forecast period, due to its critical role in pet safety and activity tracking. GPS-enabled collars and wearables offer real-time location monitoring, geofencing, and behavioral analytics, empowering owners to prevent loss and manage outdoor routines. These solutions are particularly valuable for active breeds and urban settings. As integration with health metrics and mobile platforms improves, GPS devices are evolving into multifunctional wellness hubs, reinforcing their leadership within the pet tech landscape.

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 rising adoption of tech-enabled diagnostics and behavioral tools. Clinics are increasingly integrating smart devices, AI-based symptom checkers, and remote monitoring platforms to enhance client engagement. These technologies streamline workflows, improve treatment outcomes, and support early intervention. As pet owners seek more personalized and data-backed veterinary services, clinics are becoming pivotal distribution channels for wellness tech, accelerating growth across both urban and semi-urban markets.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share due to rising pet ownership, urbanization, and growing disposable incomes. Countries like China, Japan, and India are witnessing a cultural shift toward pet

companionship, driving demand for wellness and behavioral technologies. Government initiatives supporting smart healthcare and digital ecosystems further bolster adoption. The region's tech-savvy consumer base and expanding veterinary infrastructure position APAC as a strategic hub for innovation, investment, and scalable deployment of pet wellness solutions.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to advanced digital infrastructure, high pet expenditure, and strong regulatory frameworks. The region's mature pet care market is rapidly embracing AI-driven diagnostics, behavioral analytics, and telehealth platforms. Strategic partnerships between tech firms and veterinary networks are accelerating innovation. Additionally, heightened awareness of pet mental health and preventive care is driving adoption of integrated wellness solutions. North America's ecosystem supports premium offerings, making it a growth engine for the sector.

Key players in the market

Some of the key players profiled in the Pet Wellness & Behavioral Tech Market include Petcube, The Farmer's Dog, Tractive, Airvet, Mars Petcare, Wild Earth, Invoxia, Felcana, Vetster, Pawscout, Dacadoo, Dogtra Company, Smart Eye, CleverPet and Embark Veterinary.

Key Developments:

In February 2024, Petcube expanded its product lineup by launching a GPS Tracker designed to enhance pet safety and well-being. It offers real-time location tracking, activity monitoring, and health insights through the Petcube mobile app. Features include customizable geofences, a built-in buzzer, an LED light, and a 30-day battery life. The tracker is water-resistant and compatible with various collars. This launch reflects Petcube's commitment to providing comprehensive care for pets beyond interactive cameras.

In January 2024, Invoxia introduced the Minitailz Smart Pet Tracker, an AI-powered wearable designed for dogs and cats. This device combines GPS tracking with health monitoring, measuring respiratory and heart rates, and detecting anomalies such as atrial fibrillation. It offers real-time alerts and detailed health reports through a companion app.

Products Covered:

Wearable Devices

Non-Wearable Devices

Software Platforms

Animal Types Covered:

Dogs

Cats

Horses

Other Animal Types

Technologies Covered:

GPS Technology

Artificial Intelligence

IoT (Internet of Things)

Big Data Analytics

Cloud Computing

Applications Covered:

Health Monitoring

Activity & Behavior Monitoring

Fitness & Wellness Management

Location Tracking

Behavior Training & Correction

Other Applications

End Users Covered:

Pet Owners

Veterinary Clinics

Pet Training Centers

Research Institutes

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & 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 2024, 2025, 2026, 2028, and 2032
- 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

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