

# **Working Dog Care Market Forecasts to 2034 – Global Analysis By Dog Type (Military Working Dogs, Police (K9) Dogs, Search & Rescue Dogs, Therapy & Assistance Dogs, Herding & Livestock Dogs, Hunting & Sporting Dogs, Security & Guard Dogs, Guide Dogs, and Other Dog Types), Care Service Type, Breed, Age Group, Service Delivery Mode, Application, End User, and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Working Dog Care Market is accounted for \$1.2 billion in 2026 and is expected to reach \$2.1 billion by 2034 growing at a CAGR of 6.8% during the forecast period. Working dog care encompasses all products and services dedicated to maintaining the health, nutrition, performance, and overall well-being of dogs employed in professional roles across various sectors. These specialized canines serve in defense, law enforcement, search and rescue, healthcare therapy, agriculture, and disaster response, requiring tailored veterinary care, advanced nutrition, protective equipment, and regular fitness assessments. The market includes preventive healthcare, therapeutic interventions, training support, rehabilitation services, and end-of-life care specifically designed for operational working dogs.

Market Dynamics:

Driver:

Rising deployment of working dogs in security and military operations

Global defense and security agencies are increasingly relying on working dogs for their superior olfactory capabilities, loyalty, and tactical advantages in threat detection and patrol duties. Military units across North America, Europe, and Asia are expanding their canine programs for explosives detection, ambush prevention, and base security in high-

risk environments. Law enforcement agencies similarly recognize dogs as cost-effective assets for narcotics interdiction and suspect apprehension. This expanding deployment directly translates into sustained demand for specialized healthcare, dental services, nutrition, and physical therapy to maintain peak operational readiness. The longer service lives expected from these valuable animals further intensify requirements for ongoing medical support throughout their careers.

#### Restraint:

##### Shortage of specialized veterinary professionals

Limited availability of veterinarians trained specifically in working dog medicine constrains market growth in many regions. Unlike companion animal practitioners, working dog veterinarians must understand high-intensity physical demands, stress-related conditions, and injury patterns unique to canines performing patrol, detection, and search tasks. Military bases and police kennels often face difficulties recruiting qualified personnel willing to work in demanding field conditions. This shortage leads to delayed diagnoses, increased reliance on general practitioners lacking specialized knowledge, and higher costs for remote consultations. Developing countries with expanding working dog programs experience the most severe gaps, limiting their ability to provide adequate care and reducing market penetration for advanced therapeutic products.

#### Opportunity:

##### Growth of canine rehabilitation and physiotherapy services

Expanding recognition of preventive and rehabilitative care for working dogs opens significant opportunities for specialized service providers. Canine hydrotherapy, treadmill conditioning, chiropractic adjustments, and laser therapy proven effective in human sports medicine are being adapted for military and police dogs. These interventions extend working careers by managing arthritis, post-operative recovery, and soft tissue injuries. Private clinics dedicated exclusively to working dog rehabilitation are emerging near major kennel facilities, offering recurring revenue streams through maintenance programs. Partnerships with veterinary schools to establish formal rehabilitation certifications further professionalize the field, attracting investment and creating specialized equipment markets that were previously underserved.

#### Threat:

##### Potential regulatory restrictions on certain care practices

Evolving animal welfare regulations in several jurisdictions could limit certain working dog care procedures and pharmaceutical applications. Some regions are reviewing the use of performance-enhancing medications, even for therapeutic purposes, which may restrict treatments available for injury management. Sedation protocols for dental procedures and surgical interventions face increased scrutiny, potentially complicating

routine care delivery. Furthermore, international transport regulations for medical equipment and veterinary pharmaceuticals can delay essential supplies reaching canine units in remote deployment locations. These regulatory uncertainties create compliance burdens for service providers and may increase operational costs, potentially reducing care quality or accelerating retirement of otherwise treatable working dogs.

#### Covid-19 Impact:

The pandemic created operational challenges for working dog care while simultaneously highlighting the critical nature of these animals. Lockdown restrictions limited routine veterinary visits and postponed elective procedures, leading to backlogged wellness checks and dental cleanings. However, increased biosecurity measures accelerated adoption of telemedicine consultations, enabling remote health monitoring and diagnostic support for deployed units. Working dogs involved in COVID-19 detection research gained unprecedented attention, driving new funding for respiratory health studies and specialized care protocols. The resilience demonstrated by canine programs during the crisis reinforced their value, leading to stabilized or expanded budgets for healthcare services in subsequent years.

The Defense & Military segment is expected to be the largest during the forecast period. The Defense & Military segment is expected to account for the largest market share during the forecast period, reflecting the substantial investments governments make in their canine forces worldwide. Military working dogs undergo rigorous training for explosive detection, patrol duties, and special operations support, demanding comprehensive healthcare coverage throughout their service lives. These programs typically maintain hundreds of dogs per nation, each requiring annual wellness examinations, vaccination schedules, dental prophylaxis, orthopedic assessments, and emergency care provisions. The military sector also drives demand for advanced diagnostic equipment, portable field hospitals, and evacuation protocols. Stable defense budgets in major economies, combined with increasing recognition of canine contributions, ensure this application segment remains the market leader.

The Healthcare & Therapy Organizations segment is expected to have the highest CAGR during the forecast period.

Over the forecast period, the Healthcare & Therapy Organizations segment is predicted to witness the highest growth rate, fueled by expanding evidence of canine-assisted interventions in medical settings. Hospitals, rehabilitation centers, nursing homes, and mental health clinics are increasingly employing facility dogs to support patients with PTSD, autism, dementia, and physical disabilities. These organizations require ongoing wellness programs, stress management protocols, infection control measures, and behavioral health support for their canine staff. The humanization of therapy dogs, combined with insurance recognition of animal-assisted therapy, drives demand for specialized nutritional supplements, joint maintenance products, and regular

physiotherapy. As healthcare systems embrace holistic treatment models, this end-user segment expands rapidly from a relatively small base.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by the world's largest concentration of military and law enforcement canine programs. The United States Department of Defense maintains thousands of working dogs across all branches, with comprehensive healthcare infrastructure including dedicated military veterinary hospitals. Canada similarly operates extensive police dog services across provincial and federal agencies. The region benefits from advanced veterinary training institutions producing working dog specialists, innovative therapeutic equipment manufacturers, and established emergency response protocols. Private sector investment in canine rehabilitation clinics further strengthens North America's position, ensuring continued dominance through the forecast period driven by consistent government and law enforcement spending.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by rapidly expanding security forces and modernization of working dog programs across several nations. China has significantly increased its police and military canine deployments for border security and counter-terrorism operations, requiring parallel investment in veterinary infrastructure. India's paramilitary forces are expanding dog squads for narcotics detection within increasing cross-border trade flows. Southeast Asian countries, including Thailand and Vietnam, are developing disaster response canine units following recent natural catastrophes. Economic growth enables these nations to import advanced healthcare equipment and establish training partnerships with Western institutions. The combination of rising security needs and improving veterinary standards positions Asia Pacific as the fastest-growing regional market.

Key players in the market

Some of the key players in Working Dog Care Market include Mars Incorporated, Nestlé, Purina PetCare, Hill's Pet Nutrition, Zoetis Inc., Elanco Animal Health Incorporated, Virbac, Ceva Santé Animale, IDEXX Laboratories Inc., Trupanion Inc., Nationwide Mutual Insurance Company, PetIQ Inc., Blue Buffalo Company Ltd., The Hartz Mountain Corporation, Spectrum Brands Holdings Inc., and Central Garden & Pet Company.

Key Developments:

In April 2026, Mars announced a massive strategic expansion with Google Cloud to deploy Gemini Enterprise AI across its global workforce. This "agentic" AI model is designed to optimize complex tasks within its Petcare segment, including Royal Canin and its vast veterinary networks (Banfield, VCA, BluePearl), to improve diagnostics and

operational efficiency.

In January 2026, Purina Pro Plan, a staple for working and sporting dogs, expanded its "Vet direct" service to streamline the delivery of specialized therapeutic diets directly to professional canine handlers and veterinary clinics.

In January 2026, Zoetis expanded its conservation efforts, applying its avian influenza vaccine technology to endangered marine mammals, showcasing its cross-species pathology expertise.

Dog Types Covered:

Military Working Dogs

Police (K9) Dogs

Search & Rescue Dogs

Therapy & Assistance Dogs

Herding & Livestock Dogs

Hunting & Sporting Dogs

Security & Guard Dogs

Guide Dogs

Other Dog Types

Care Service Types Covered:

Training & Conditioning

Veterinary & Medical Care

Nutrition & Diet Management

Grooming & Hygiene

Boarding, Kenneling & Daycare

Physical Fitness & Exercise

Rehabilitation & Recovery

Monitoring & Tracking Services

Retirement & Adoption Services

**Breeds Covered:**

German Shepherd

Belgian Malinois

Labrador Retriever

Dutch Shepherd

Golden Retriever

Bloodhound

Rottweiler

Springer Spaniel

Other Breeds

**Age Groups Covered:**

Puppies (Training Phase)

Adult Working Dogs

Senior / Retired Dogs

**Service Delivery Modes Covered:**

- Facility-Based Care
- On-Site / Field-Based Care
- In-Home Care
- Digital / Remote Monitoring

**Applications Covered:**

- Defense & Military
- Law Enforcement
- Search & Rescue Operations
- Healthcare & Therapy Services
- Agriculture & Livestock Management
- Commercial Security
- Hunting & Sporting
- Disaster Response
- Other Applications

**End Users Covered:**

- Government & Defense Organizations
- Law Enforcement Agencies
- Private Security Firms

Healthcare & Therapy Organizations

Agriculture & Livestock Handlers

Individual Trainers & Handlers

Non-Profit 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 WORKING DOG CARE MARKET, BY DOG TYPE**

- 5.1 Military Working Dogs
- 5.2 Police (K9) Dogs
- 5.3 Search & Rescue Dogs
- 5.4 Therapy & Assistance Dogs
- 5.5 Herding & Livestock Dogs
- 5.6 Hunting & Sporting Dogs
- 5.7 Security & Guard Dogs
- 5.8 Guide Dogs
- 5.9 Other Dog Types

## **6 GLOBAL WORKING DOG CARE MARKET, BY CARE SERVICE TYPE**

- 6.1 Training & Conditioning
  - 6.1.1 Obedience Training
  - 6.1.2 Specialized Operational Training
  - 6.1.3 Behavioral Training
- 6.2 Veterinary & Medical Care
- 6.3 Nutrition & Diet Management
- 6.4 Grooming & Hygiene
- 6.5 Boarding, Kenneling & Daycare
- 6.6 Physical Fitness & Exercise
- 6.7 Rehabilitation & Recovery
- 6.8 Monitoring & Tracking Services
- 6.9 Retirement & Adoption Services

## **7 GLOBAL WORKING DOG CARE MARKET, BY BREED**

- 7.1 German Shepherd
- 7.2 Belgian Malinois
- 7.3 Labrador Retriever
- 7.4 Dutch Shepherd
- 7.5 Golden Retriever
- 7.6 Bloodhound

- 7.7 Rottweiler
- 7.8 Springer Spaniel
- 7.9 Other Breeds

## **8 GLOBAL WORKING DOG CARE MARKET, BY AGE GROUP**

- 8.1 Puppies (Training Phase)
- 8.2 Adult Working Dogs
- 8.3 Senior / Retired Dogs

## **9 GLOBAL WORKING DOG CARE MARKET, BY SERVICE DELIVERY MODE**

- 9.1 Facility-Based Care
- 9.2 On-Site / Field-Based Care
- 9.3 In-Home Care
- 9.4 Digital / Remote Monitoring

## **10 GLOBAL WORKING DOG CARE MARKET, BY APPLICATION**

- 10.1 Defense & Military
- 10.2 Law Enforcement
- 10.3 Search & Rescue Operations
- 10.4 Healthcare & Therapy Services
- 10.5 Agriculture & Livestock Management
- 10.6 Commercial Security
- 10.7 Hunting & Sporting
- 10.8 Disaster Response
- 10.9 Other Applications

## **11 GLOBAL WORKING DOG CARE MARKET, BY END USER**

- 11.1 Government & Defense Organizations
- 11.2 Law Enforcement Agencies
- 11.3 Private Security Firms
- 11.4 Healthcare & Therapy Organizations
- 11.5 Agriculture & Livestock Handlers
- 11.6 Individual Trainers & Handlers
- 11.7 Non-Profit Organizations

## 12 GLOBAL WORKING DOG CARE MARKET, BY GEOGRAPHY

### 12.1 North America

12.1.1 United States

12.1.2 Canada

12.1.3 Mexico

### 12.2 Europe

12.2.1 United Kingdom

12.2.2 Germany

12.2.3 France

12.2.4 Italy

12.2.5 Spain

12.2.6 Netherlands

12.2.7 Belgium

12.2.8 Sweden

12.2.9 Switzerland

12.2.10 Poland

12.2.11 Rest of Europe

### 12.3 Asia Pacific

12.3.1 China

12.3.2 Japan

12.3.3 India

12.3.4 South Korea

12.3.5 Australia

12.3.6 Indonesia

12.3.7 Thailand

12.3.8 Malaysia

12.3.9 Singapore

12.3.10 Vietnam

12.3.11 Rest of Asia Pacific

### 12.4 South America

12.4.1 Brazil

12.4.2 Argentina

12.4.3 Colombia

12.4.4 Chile

12.4.5 Peru

12.4.6 Rest of South America

### 12.5 Rest of the World (RoW)

12.5.1 Middle East

- 12.5.1.1 Saudi Arabia
- 12.5.1.2 United Arab Emirates
- 12.5.1.3 Qatar
- 12.5.1.4 Israel
- 12.5.1.5 Rest of Middle East
- 12.5.2 Africa
  - 12.5.2.1 South Africa
  - 12.5.2.2 Egypt
  - 12.5.2.3 Morocco
  - 12.5.2.4 Rest of Africa

## **13 STRATEGIC MARKET INTELLIGENCE**

- 13.1 Industry Value Network and Supply Chain Assessment
- 13.2 White-Space and Opportunity Mapping
- 13.3 Product Evolution and Market Life Cycle Analysis
- 13.4 Channel, Distributor, and Go-to-Market Assessment

## **14 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES**

- 14.1 Mergers and Acquisitions
- 14.2 Partnerships, Alliances, and Joint Ventures
- 14.3 New Product Launches and Certifications
- 14.4 Capacity Expansion and Investments
- 14.5 Other Strategic Initiatives

## **15 COMPANY PROFILES**

- 15.1 Mars Incorporated
- 15.2 Nestl? Purina PetCare
- 15.3 Hill's Pet Nutrition
- 15.4 Zoetis Inc.
- 15.5 Elanco Animal Health Incorporated
- 15.6 Virbac
- 15.7 Ceva Sant? Animale
- 15.8 IDEXX Laboratories Inc.
- 15.9 Trupanion Inc.
- 15.10 Nationwide Mutual Insurance Company
- 15.11 PetIQ Inc.

- 15.12 Blue Buffalo Company Ltd.
- 15.13 The Hartz Mountain Corporation
- 15.14 Spectrum Brands Holdings Inc.
- 15.15 Central Garden & Pet Company

## List Of Tables

### LIST OF TABLES

Table 1 Global Working Dog Care Market Outlook, By Region (2023–2034) (\$MN)

Table 2 Global Working Dog Care Market Outlook, By Dog Type (2023–2034) (\$MN)

Table 3 Global Working Dog Care Market Outlook, By Military Working Dogs (2023–2034) (\$MN)

Table 4 Global Working Dog Care Market Outlook, By Police (K9) Dogs (2023–2034) (\$MN)

Table 5 Global Working Dog Care Market Outlook, By Search & Rescue Dogs (2023–2034) (\$MN)

Table 6 Global Working Dog Care Market Outlook, By Therapy & Assistance Dogs (2023–2034) (\$MN)

Table 7 Global Working Dog Care Market Outlook, By Herding & Livestock Dogs (2023–2034) (\$MN)

Table 8 Global Working Dog Care Market Outlook, By Hunting & Sporting Dogs (2023–2034) (\$MN)

Table 9 Global Working Dog Care Market Outlook, By Security & Guard Dogs (2023–2034) (\$MN)

Table 10 Global Working Dog Care Market Outlook, By Guide Dogs (2023–2034) (\$MN)

Table 11 Global Working Dog Care Market Outlook, By Other Dog Types (2023–2034) (\$MN)

Table 12 Global Working Dog Care Market Outlook, By Care Service Type (2023–2034) (\$MN)

Table 13 Global Working Dog Care Market Outlook, By Training & Conditioning (2023–2034) (\$MN)

Table 14 Global Working Dog Care Market Outlook, By Obedience Training (2023–2034) (\$MN)

Table 15 Global Working Dog Care Market Outlook, By Specialized Operational Training (2023–2034) (\$MN)

Table 16 Global Working Dog Care Market Outlook, By Behavioral Training (2023–2034) (\$MN)

Table 17 Global Working Dog Care Market Outlook, By Veterinary & Medical Care (2023–2034) (\$MN)

Table 18 Global Working Dog Care Market Outlook, By Nutrition & Diet Management (2023–2034) (\$MN)

Table 19 Global Working Dog Care Market Outlook, By Grooming & Hygiene (2023–2034) (\$MN)

Table 20 Global Working Dog Care Market Outlook, By Boarding, Kenneling & Daycare (2023–2034) (\$MN)

Table 21 Global Working Dog Care Market Outlook, By Physical Fitness & Exercise (2023–2034) (\$MN)

Table 22 Global Working Dog Care Market Outlook, By Rehabilitation & Recovery (2023–2034) (\$MN)

Table 23 Global Working Dog Care Market Outlook, By Monitoring & Tracking Services (2023–2034) (\$MN)

Table 24 Global Working Dog Care Market Outlook, By Retirement & Adoption Services (2023–2034) (\$MN)

Table 25 Global Working Dog Care Market Outlook, By Breed (2023–2034) (\$MN)

Table 26 Global Working Dog Care Market Outlook, By German Shepherd (2023–2034) (\$MN)

Table 27 Global Working Dog Care Market Outlook, By Belgian Malinois (2023–2034) (\$MN)

Table 28 Global Working Dog Care Market Outlook, By Labrador Retriever (2023–2034) (\$MN)

Table 29 Global Working Dog Care Market Outlook, By Dutch Shepherd (2023–2034) (\$MN)

Table 30 Global Working Dog Care Market Outlook, By Golden Retriever (2023–2034) (\$MN)

Table 31 Global Working Dog Care Market Outlook, By Bloodhound (2023–2034) (\$MN)

Table 32 Global Working Dog Care Market Outlook, By Rottweiler (2023–2034) (\$MN)

Table 33 Global Working Dog Care Market Outlook, By Springer Spaniel (2023–2034) (\$MN)

Table 34 Global Working Dog Care Market Outlook, By Other Breeds (2023–2034) (\$MN)

Table 35 Global Working Dog Care Market Outlook, By Age Group (2023–2034) (\$MN)

Table 36 Global Working Dog Care Market Outlook, By Puppies (Training Phase) (2023–2034) (\$MN)

Table 37 Global Working Dog Care Market Outlook, By Adult Working Dogs (2023–2034) (\$MN)

Table 38 Global Working Dog Care Market Outlook, By Senior / Retired Dogs (2023–2034) (\$MN)

Table 39 Global Working Dog Care Market Outlook, By Service Delivery Mode (2023–2034) (\$MN)

Table 40 Global Working Dog Care Market Outlook, By Facility-Based Care (2023–2034) (\$MN)

Table 41 Global Working Dog Care Market Outlook, By On-Site / Field-Based Care

(2023–2034) (\$MN)

Table 42 Global Working Dog Care Market Outlook, By In-Home Care (2023–2034) (\$MN)

Table 43 Global Working Dog Care Market Outlook, By Digital / Remote Monitoring (2023–2034) (\$MN)

Table 44 Global Working Dog Care Market Outlook, By Application (2023–2034) (\$MN)

Table 45 Global Working Dog Care Market Outlook, By Defense & Military (2023–2034) (\$MN)

Table 46 Global Working Dog Care Market Outlook, By Law Enforcement (2023–2034) (\$MN)

Table 47 Global Working Dog Care Market Outlook, By Search & Rescue Operations (2023–2034) (\$MN)

Table 48 Global Working Dog Care Market Outlook, By Healthcare & Therapy Services (2023–2034) (\$MN)

Table 49 Global Working Dog Care Market Outlook, By Agriculture & Livestock Management (2023–2034) (\$MN)

Table 50 Global Working Dog Care Market Outlook, By Commercial Security (2023–2034) (\$MN)

Table 51 Global Working Dog Care Market Outlook, By Hunting & Sporting (2023–2034) (\$MN)

Table 52 Global Working Dog Care Market Outlook, By Disaster Response (2023–2034) (\$MN)

Table 53 Global Working Dog Care Market Outlook, By Other Applications (2023–2034) (\$MN)

Table 54 Global Working Dog Care Market Outlook, By End User (2023–2034) (\$MN)

Table 55 Global Working Dog Care Market Outlook, By Government & Defense Organizations (2023–2034) (\$MN)

Table 56 Global Working Dog Care Market Outlook, By Law Enforcement Agencies (2023–2034) (\$MN)

Table 57 Global Working Dog Care Market Outlook, By Private Security Firms (2023–2034) (\$MN)

Table 58 Global Working Dog Care Market Outlook, By Healthcare & Therapy Organizations (2023–2034) (\$MN)

Table 59 Global Working Dog Care Market Outlook, By Agriculture & Livestock Handlers (2023–2034) (\$MN)

Table 60 Global Working Dog Care Market Outlook, By Individual Trainers & Handlers (2023–2034) (\$MN)

Table 61 Global Working Dog Care Market Outlook, By Non-Profit 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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