

VETS MARKET INVESTIGATION

Summary of roundtable discussion on our provisional decision with representatives from small independent veterinary practices via MS Teams on 19 November 2025

Introduction

1. The following is a summary of points raised in a discussion between CMA case team members and representatives from small independent veterinary practices including veterinary surgeons, veterinary nurses, and practice managers.
2. In advance of the roundtable discussion, the CMA gave an introduction to its provisional competition concerns, as outlined in its provisional decision report (part A).¹
3. The remainder of the roundtable discussion focused on the CMA's provisional remedies package, as outlined in its provisional decision report (part B).² The discussion covered the following proposed remedies:
 - pet owner empowerment remedies;
 - choice of treatments, referrals and diagnostics;
 - cremations;
 - complaints and redress;
 - medicines market opening remedies; and
 - medicines: Prescription price controls.

¹ [Provisional decision report - part A \(competition concerns\)](#), 15 October 2025.

² [Provisional decision report: part B](#), 15 October 2025.

Pet owner empowerment remedies

4. Attendees were supportive of ownership transparency. They also generally supported transparency of prices, noting that many independent practices already published price lists and provided estimates. Some said that simplistic price lists could mislead clients, as veterinary procedures varied widely in complexity and quality. One attendee stated that having a fixed price for a procedure would likely mean that the simple cases were charged more to fit into that price bracket.
5. Attendees said that price lists could encourage a “race to the bottom,” potentially reducing care quality, if pet owners were too focused on prices. Cross-subsidisation between services was highlighted as a current practice, for example discounted neutering prices were offset by higher charges elsewhere.
6. Several attendees noted that differences in practice standards, such as the use of qualified nurses and monitoring equipment, made direct price comparisons difficult. Attendees said that clients would not read or understand explanatory notes.
7. Attendees said that the Find a Vet website might not be accurate or useful due to outdated information. Concerns were also raised about grouping all independent practices together in surveys, given the significant variation between practices.
8. Some attendees said further analysis was needed of independent practice profitability, saying that the proposed pet owner empowerment remedies could force fee increases or business closures.

Choice of treatments, referrals and diagnostics

9. Attendees supported the requirements in principle to inform pet owners about costs and itemised bills, saying that many already did so. However, they suggested that there were challenges in identifying treatment pathways and estimating costs, particularly for referrals and complex cases. One attendee said it would not be possible to provide an estimate for every procedure that referral centres might carry out.
10. Attendees said that referral costs were often unpredictable and wide ranging depending on diagnostics and treatment plans. Providing precise estimates was seen as impractical, and requiring written updates mid-procedure was considered unhelpful.

11. Attendees said there would be an administrative burden and a risk of increased complaints from pet owners if estimates were exceeded, even by small amounts.
12. Attendees said that it would be difficult to provide written estimates during emergency or rapidly changing clinical situations.

Cremations

13. Attendees agreed that transparency in cremation options and pricing was positive and said many practices already provided this information. Practical challenges were highlighted regarding storage of deceased animals, particularly large ones. One attendee said that providing cold storage in the medium term would not be possible due to limited collection schedules and storage capacity. Another said there would be logistical challenges in relation to storage and labelling systems which could lead to a risk of human error.
14. Attendees said that clients often preferred to make decisions in advance, and that delays could increase the risk of errors in handling remains.

Complaints and redress

15. Attendees said there would be a higher burden on smaller practices, which may lack dedicated staff for complaint handling. The potential volume of mediation cases was also raised as a concern.
16. Attendees shared mixed experiences with mediation, suggesting that outcomes often depended on the mediator's clinical understanding. There was a concern that mediation could become burdensome and costly, especially for complaints about pricing rather than care quality. Attendees asked what enforcement of a requirement on veterinary businesses to mediate 'in good faith' would involve.
17. One attendee said that many requirements, including the requirement to have a complaint process, were already covered by the voluntary Practice Standards Scheme (**PSS**) and suggested making it mandatory rather than introducing new processes. Others disagreed, suggesting that the PSS should not be mandated.

Medicines: Market opening remedies

18. Attendees expressed concerns about the practicality and consequences of the CMA's medicine remedies. Attendees said that some practice management systems were not equipped to issue prescriptions electronically

as required. Attendees also said there was a risk of fraud and said some practices had moved to direct email of prescriptions to pharmacies to prevent misuse.

19. Attendees said that directing clients to online pharmacies, some of which were owned by Large Veterinary Groups (**LVGs**), would reduce independent practices' revenue and could lead to fee increases for other services. One attendee said that the proposed remedies would give more revenue to the LVGs which own some of the online pharmacies.
20. Attendees said managing multiple prescriptions for different animals and medications was complex and raised concerns about administrative burdens and patient safety. Attendees said that most independents already participated in buying groups but still could not match LVG discounts.
21. Attendees questioned whether the remedies would achieve the intended competition benefits and said that they could accelerate industry consolidation and disadvantage independents.

Medicines: Prescription price controls

22. Attendees opposed the £16 cap, suggesting it did not reflect the time, responsibility, and costs involved in issuing prescriptions. Several attendees said that their current fees were higher and that the cap would result in loss-making activity. Attendees queried the basis for the cap, suggesting that it was below the average fee for many practices and did not account for VAT or the full range of services provided.
23. Attendees raised concerns about the feasibility of including multiple animals or medications on a single prescription and said that this was not supported by practice management systems or current clinical practice.
24. Attendees said that the cap would mean practices might need to increase other fees, potentially reducing access to care. Attendees said there was a risk of increased administrative burden and reduced service quality.