VETERINARY SERVICES FOR HOUSEHOLD PETS MARKET INVESTIGATION

The Veterinary Services Market Investigation Order 2026

Notice on the making of an Order under sections 161 and 165 of, and Schedule 10 to, the Enterprise Act 2002

Introduction

1. This Notice follows the consultation the Competition and Markets Authority (**CMA**) has carried out on the making of an Order to implement the decisions made in its report *Veterinary services for household pets: Final decision report* (the **Final Report**). [1] It sets out and explains the Order the CMA has decided to make.

2. The background to the Final Report and the consultation process the CMA followed are described below. Alongside the Order, the CMA has published a document summarising the responses it received to the consultation and setting out its assessment of those responses insofar as they were responsive to the consultation.

Background

3. On 23 May 2024, following a market review launched on 7 September 2023 and a consultation opened on 12 March 2024, the CMA, in exercise of its powers under sections 131 and 133 of the Enterprise Act 2002 (the **Act**), made a reference for a market investigation in relation to the supply of Veterinary Services for Household Pets in the United Kingdom.

4. On the same date, the CMA appointed from its panel a group of five independent members (the **Group**) to conduct the market investigation and publish a final report. The Group was required to decide whether any feature, or combination of features, of each relevant market prevents, restricts or distorts competition and thereby has an adverse effect on competition (**AEC**) and, if so, what action should be taken.

[1] Unless stated, or context requires otherwise, terms used in this Notice have the same meaning as in the Substantive Order and the Final Report.

5. On 24 March 2026, the CMA published the Final Report in which it concluded that there are certain features which have an AEC in the markets for (i) the retail supply of Veterinary Services for Household Pets by First Opinion Practices (**FOPs**) in the UK, and (ii) the supply of outsourced out-of-hours (**OOH**) provision to FOPs in the UK. Those features are set out in section 15 of Part A of the Final Report (in paragraphs 15.15 and 15.23).[2]

6. The Group decided that, in order to address the AEC and resulting customer detriment, a package of remedies should be adopted consisting of:

   (a) Measures to empower Pet Owners when making choices, relating to:

      (i) Transparency of the ownership of Veterinary Businesses

      (ii) The ability to compare FOPs directly

      (iii) Better pricing information when choosing treatments and services

      (iv) Increased awareness of the ability to purchase medicines online and potential savings

      (v) Clear information on end-of-life services

   (b) Measures to remove barriers to engagement and competition, relating to:

      (i) Ensuring that Vets and Veterinary Nurses are able to act in accordance with the relevant provisions of the Royal College of Veterinary Surgeons (**RCVS**) Code and Guidance

      (ii) Making it easier for Pet Owners to get and use a written prescription

      (iii) Improving consumer complaints and redress mechanisms

      (iv) Making it easier for FOPs to switch OOH provider

   (c) A recommendation to government on reform of the existing statutory regime for the regulation of Veterinary Services

   (d) Recommendations to the RCVS and the Veterinary Medicines Directorate (**VMD**).

7. To support this integrated package of remedies, the Group decided to impose obligations on Veterinary Businesses to require them to set and ensure compliance with policies, processes and practices across their FOPs, OOH

[2] Since the publication of the Final Report, two members of the Group have ceased to be members of it. One Group member’s appointment to the CMA panel ended on 1 April 2026, and another resigned from the Group on 24 April 2026. Each cessation of membership of the Group, and the Group’s continued functioning with its remaining members thereafter, is in accordance with Schedule 4 to the Enterprise and Regulatory Reform Act 2013.

Services, Referral Centres, animal hospitals, diagnostic laboratories, Crematoria and Authorised Online Retailers (as the case may be).

8. The Group also decided to implement this remedies package by requiring the RCVS (as the existing sector regulator) to play an enhanced role, in order to address the wide-ranging concerns identified in the Final Report. The Group decided that the RCVS should be required – by means of Undertakings it gives to the CMA or by Order – to perform certain activities to support the remedies imposed on Veterinary Businesses, and to monitor compliance by those businesses with those remedies (**RCVS Activities**). The Group decided that the costs of the RCVS's performance of the RCVS Activities should be met by Veterinary Businesses paying a Levy to the RCVS.

9. The remedies are therefore implemented by a combination of (i) CMA Orders on Veterinary Businesses and (ii) the RCVS entering into legally binding Undertakings. Some of these instruments (such as the Order to which this Notice relates) set out substantive requirements on Veterinary Businesses and the RCVS. Others provide mechanisms which put in place the funding required for the RCVS's performance of the RCVS Activities.

10. Specifically, the package of remedies is implemented by:

(a) the Order imposing substantive requirements on Veterinary Businesses to which this Notice relates (to be known as 'The Veterinary Services Market Investigation Order 2026' and referred to in this Notice as the **Substantive Order**);

(b) the Undertakings entered into by the RCVS relating to the RCVS Activities (to be known as 'The Veterinary Services Market Investigation Royal College of Veterinary Surgeons Undertakings 2026' and referred to in this Notice as the **Substantive RCVS Undertakings**);[3]

(c) The Veterinary Services Market Investigation (Funding) Order 2026 (the **Funding Order**);

(d) The Veterinary Services Market Investigation Royal College of Veterinary Surgeons (Funding) Undertakings 2026 (the **RCVS Funding Undertakings**);[4] and

(e) recommendations to government, the RCVS and the VMD as set out in the Final Report.

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[3] The CMA's acceptance of the Substantive RCVS Undertakings is the subject of a separate notice published on the same date as this Notice, together with those Undertakings.

[4] The Funding Order was made and the RCVS Funding Undertakings were accepted on 20 August 2026.

11. The purpose of the Substantive Order is to give effect to the Group's decisions in the Final Report about the measures that should be imposed on Veterinary Businesses to remedy, mitigate or prevent the AEC it found and the resulting detrimental effects on customers. The provisions of the Order are consistent with those decisions. The effect of the Substantive Order is to remedy, mitigate or prevent the AEC and the detrimental effects on customers that result from it. The CMA considers that the making of the Substantive Order is justified on those bases.

12. In accordance with section 165 of, and paragraph 2(1)(a) of Schedule 10 to, the Act, on 21 July 2026 the CMA gave notice of its intention to make the Substantive Order and invited representations on the Draft Order (the **Consultation**). It also served a copy of the draft Notice and the draft Order electronically on each of the main parties to the market investigation.

The Consultation

13. The CMA received 278 responses to its Consultation and has considered them. In light of them, the CMA has made some modifications to the proposed Order it consulted on. The reasons why the CMA did so are set out in the statement explaining how it has considered the representations that has been published with the Order.

14. The CMA considers that the modifications are not material in any respect. It has decided, in accordance with paragraph 5 of Schedule 10 to the Act, that the Order, as modified, does not require any further consultation.

15. A selection of responses to the Consultation has been published on the CMA website alongside the summary of responses to the Consultation.

Next steps

16. The CMA now gives notice of the making of the attached Order. The Order is made in accordance with section 138 and in exercise of the powers conferred by section 161 of and Schedule 8 to the Act.

17. This Notice, the Order and Explanatory Note accompanying the Order, which provides an explanation of how the Order is expected to operate, are published on the CMA website.

(signed) MARTIN COLEMAN
Group Chair
22 September 2026