



PETS International

THE GO-TO PUBLICATION FOR PET INDUSTRY PROFESSIONALS SINCE 1988

NOV 2024



FOOD & INGREDIENTS

Gut health, raw food & fermentation

NORDICS

Regional report & retailer interview

PET CARE

Anxiety, travel, fleas & ticks

TREND REPORTS

AI, SMALL ANIMALS & CAT FOOD



QDS®
BAKE



DRY & COOK & BAKE SOLUTIONS



- **New All-in-One technology:**
Dehydrating, cooking and baking by forced convection
- **Acceleration of Innovation:**
Allows to develop new foods and treats for pets
- **Great Versatility:**
Possibility to dry & cook & bake any type of product and format
- **Process Optimization:**
Continuous system, with superior performance and lower energy consumption
- **Full Connectivity 4.0:**
Full control of the process

INSIDE THIS ISSUE



16

Keeping up with the pace of change

With rapid advances in monitoring, diagnosis and treatment, how is AI impacting the health sector for pets?



Picture of health: nutrition in the Nordics

The rise of the raw pet food trend across Sweden, Finland, Denmark and Norway.

23

Caring for older cats

As feline companions live longer, there's increasing interest in addressing how nutritional needs evolve through different life stages.

63

What's in store for 2025 and beyond?

Bloomberg Intelligence's Global Pet Economy report highlights strengthening smaller markets and an expanding healthcare segment.

28



The 'other' category

Smaller animals, rodents and birds tend to be overlooked compared to cats and dogs but as owners seek comparable products, it's a market ripe for reinvention.

66

And more:

Interview: Ellinor Persdotter Nilsson, CCO, Musti	19
The link between dog ownership and children's activity	34
Traveling with pets: what issues do owners identify?	42
Fleas and ticks: how does the market operate?	46
Targeting anxiety, pain and low mood in pets	50
Fermented foods and pet gut health	71

NUTRIPE®

INSPIRED BY NATURE, FORTIFIED BY SCIENCE

SIGNATURE INGREDIENT **The Green Tripe**

NUTRIPE'S KRUNCH Oven-Baked Dry Food and WILDCUTS Freeze-Dried ranges deliver nature's best for cats and dogs alike. KRUNCH'S slow-baked process locks in natural flavors and nutrients, with high meat content, New Zealand-sourced protein, and superfoods like fish oil, seaweed, and blueberries. WILDCUTS, inspired by the ancestral Whole Prey Diet, uses a cold-press technique to preserve peak nutrition, enriched with goat's milk, manuka honey, and cranberries for immune and urinary health.

Together, they offer a nutrient-dense diet to support your pet's well-being.



SCIENTIST
FORMULATED

Silver jubilee

As we conclude 2024 and embark on a new year, it's the perfect moment for reflection. Despite ongoing challenges, the pet industry has once again demonstrated remarkable resilience and adaptability.

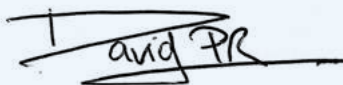
We are in a period of transformation: pet parents are increasingly mindful of the value of their purchases, signaling a shift in consumer behavior that is already shaping the future of the market. Meanwhile, artificial intelligence (AI) is proving essential for companies to better understand consumer preferences and make informed decisions.

A recent industry poll among our newsletter subscribers found that 49% of respondents are already using AI in their businesses, while 45.3% have not yet adopted the technology. In this issue, we explore the current state of AI in the industry and its potential to improve retail practices.

On another note, we are also celebrating a significant milestone for our flagship event. The upcoming GlobalPETS Forum will be the 25th such occasion that we gather to share insights and best practices, and hold discussions on the present and future of the business.

It will be a great opportunity to catch up with all of you and gain relevant insights from invited speakers. And to celebrate this special year, we will take a look back at 1999 – the year it all began – and discuss how the industry has changed since then.

Happy reading, and I hope to see you in Prague.



David Palacios Rubio
Editor-in-Chief



“ Instead of looking at the past, I put myself ahead 20 years and try to look at what I need to do now in order to get there then. ”

DIANA ROSS, SINGER

 **PETS International**
part of  **GlobalPETS**

Intermedium Publishers BV
Newtonstraat 3
1098GX Amsterdam (NL)

+31-33-4225833
content@pets.nl

Editorial team

Managing Director: Philippe Vanderhoydonck
Editor-in-Chief: David Palacios Rubio
Head of Operations: Lisa van Roon
Senior Editor: Janetta Willis
Editors: Jessica Martindale, Lynn Radford,
Mandy Wolters-Savage, Elizabeth Youens
Design: Hester de Gier

© Copyright 2024, Intermedium Publishers BV.
All rights reserved.

While we, as the publisher, aim for accuracy and completeness in the information and statistics presented, we cannot guarantee that. We cannot be held liable for any use of this information. The publisher is not responsible for the content of advertisements or sponsored editorial.

globalpetindustry.com



Don't miss out on key updates in the dynamic pet industry!

Subscribe to our newsletter at globalpetindustry.com, or just scan this QR code for an easy sign-up process.



Canadian insect protein player secures investment

Quebec-based Entosystem has secured a CAD58 million (\$42M/€38.9M) injection from investment firms Idealist Capital and Fondation, as well as agricultural food firm Sanimax.

The resulting expansion is expected to increase production volume and meet the current demand for “sustainable, nutrient-rich and hypoallergenic protein alternatives” in the pet food industry, broadening its existing supply from the urban poultry sector.

The investment is also expected to accelerate Entosystem’s production capabilities and contribute to the construction of a second commercial plant, the location of which has yet to be decided.

Saudi firm to build largest pet food factory in Middle East

Saudi Arabian manufacturer Delicious Food Factory has announced the construction of a new 55,000 sq m pet food factory north of the capital, Riyadh.

The company claims it will be the largest pet food facility in the Middle East, with an expected annual production capacity of 100,000 metric tons.

The production plant, which is slated to be completed by late 2026, received the support of the Saudi government to cope with rising pet food demand across the region.

Maltento expands footprint to Europe

After securing a funding of \$3.3 million (€3.1M) in 2023, the South African biotech company is looking to enter new markets.

Maltento announced it is expanding its product offering into the UK and other European markets, including Germany, France, Spain, Belgium and the Netherlands. It forecasts that expanding into Europe could triple its revenue by 2026.

The company is also scaling up production at its plant in the Epping district of Cape Town to hit 150 metric tons per month by the middle of next year.





Freshpet raises yearly guidance following strong performance

Freshpet projects net sales of around \$975 million (€895.7M) for 2024, a 27% increase from 2023. The company had previously updated its projected net sales to \$965 million (€900M) for the year, up from an original projection of \$950 million (€886M).

According to NielsenIQ data shared by Freshpet, it currently accounts for 3.2% of the US dog food market, up from 3% earlier this year.

The New Jersey-based pet business aims to reach 20 million households by 2027, which company CEO Billy Cyr says it's on track to meet.

Inspired Pet Nutrition acquires Butcher's Pet Care

Pet food manufacturer Inspired Pet Nutrition (IPN) has completed the acquisition of fellow UK company, Northampton-based Butcher's Pet Care, in a move that was announced in August.

IPN Chief Executive Officer (CEO) Arthur van Benthem says his team is "thrilled" to welcome the new colleagues: "This is the start of an exciting new chapter where we unite our passion for pets, combine expertise and share heritage to make an even bigger impact in the UK and European pet food markets."

The new group is expected to hit over €400 million (\$432.4M) in gross sales.



Pets at Home unveils new pet care center format

Leading UK pet retailer Pets at Home has opened its first small-format pet care center, a 7,750 sq ft concept store in Beckenham in outer London. The location offers pet parents veterinary care combined with a "comprehensive" retail experience. Pet owners visiting the store can access services such as vaccinations, routine check-ups and advanced medical treatments while shopping for pet supplies.

This launch is part of Pets at Home's ongoing UK retail expansion strategy. The company, which opened 5 new pet care centers this year, tells GlobalPETS that its ambition is to open 20 sites in the medium term.

At the same time, the business initiated the second phase of its £25 million (\$32.4M/€29.9M) share buyback program. This phase, valued at £12.5 million (\$16.2M/€14.9M), aims to raise per-share value and underscore Pets at Home's financial position.

The company has developed an AI agent to support the retailer's profit protection team in compiling cases more efficiently and assessing profit and loss. This allows skilled staff to focus on in-depth analysis rather than data gathering.

The solution is also part of Pets at Home's broader adoption of Microsoft technology, including fraud detection and scribing tools for clinical settings. The company aims to improve customer service and operational efficiency across its locations and e-commerce platform.



An event by



ZOOMARK



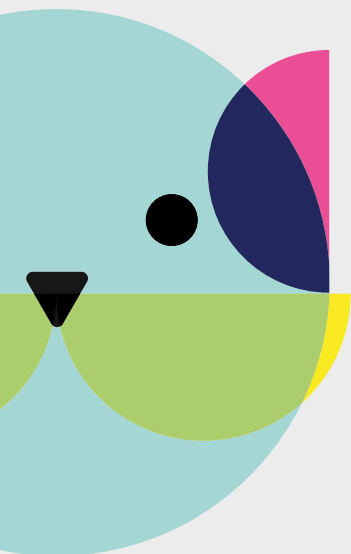
21st international trade show for pet food and pet care

ZOOMARK

BolognaFiere, Italy

5—7 May 2025

Bigger and bolder



Show Office
info@zoomark.it
zoomark.it

Certified Trade Fair



with the patronage of





US: more pets, but less money for supplies and vet visits

New data from the American Veterinary Medical Association (AVMA) concludes that despite the increase in pet ownership, total pet spending – excluding adoption or purchase costs – remained consistent at \$1,515 (€1,396) in both 2023 and 2024.

Spending patterns in the US varied between dog and cat owners. Dog owners reduced their overall expenditure in 2024 to \$1,740 (€1,603) from \$1,852 (€1,707) last year, while cat owners saw a slight increase to \$1,311 (€1,208) from \$1,235 (€1,138) in 2023.

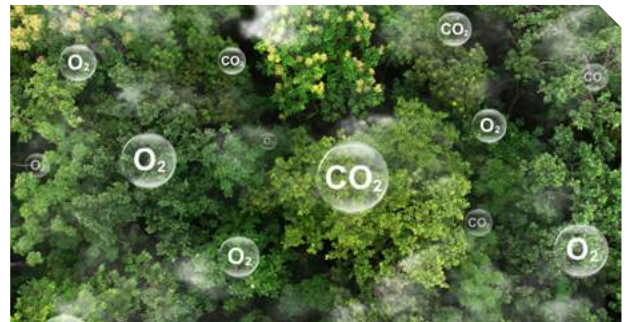
Veterinary care accounted for approximately one-third of total spending. According to the data, overall veterinary spending in 2024 decreased by 4% compared to 2023.

LanzaTech expands novel CO2 protein production

Illinois-based LanzaTech is expanding its biorefining capabilities to scale the production of its microbial protein derived from carbon dioxide (CO2), aimed at applications in fish, pet and human alternative protein markets.

The company uses a gas fermentation process involving proprietary bacteria consuming CO2 and low-carbon hydrogen to produce a sustainable, sugar-free and cost-effective protein.

Although the investment amount remains undisclosed, the expansion is part of LanzaTech’s strategy to enter the \$1 trillion (€922B) alternative protein market, diversify its consumer base and boost revenue.



Younger Italians keener on pets than kids

A recent study by the European financial services group Unipol of 1,000 people shows that Italian millennials (those born between 1981 and 1996) and Gen Z (born from 1997 to 2012) are more open to having pets than children.

37% of millennial pet owners supported this idea, with 36% of Gen Z feeling the same. In contrast, older generations in Italy, such as baby boomers (born between 1946 and 1964), are less likely to agree, with only 13% considering pets as replacements for children.

While 63% of respondents believed pets could not replace children, 28% disagreed, citing that pets fill emotional voids, are easier to manage and can be treated like children.

Additionally, 12% of those surveyed believe rising pet ownership has contributed to the falling birth rates, while 75% disagreed.



pramyp®



MORE THAN
75%+
MOISTURE!



PREY-INSPIRED HIGH MOISTURE, HIGH PROTEIN DIET

PERFECT FOR ALL CATS, WITH A VARIETY OF FORMATS
AND FLAVORS ACROSS ALL LIFE STAGES

AVAILABLE IN COMPLETE AND BALANCED, FUNCTIONAL,
BROTH, AND HIGH-PROTEIN FORMULAS



IF INTERESTED TO BECOME DISTRIBUTOR,
EMAIL US AT: INFO@SHAWPETGROUP.COM OR SALES@SHAWPET.COM

[Prampycat](#) [Prampycat](#) Prampycat.com



UK sees rise in number of obese pets

New research from UK Pet Food concluded that 43% of cats in the country are now classified as overweight, up from 40% in 2014. Half the dog population falls into the same category compared to 45% a decade ago.

Small mammals have also seen an increase, with 31% now considered overweight and 9% of pet birds now affected by obesity.

A significant knowledge gap exists between pet owners' perceptions of their pets' weight and veterinarians' diagnoses. While 77% of pet owners in the UK believe their pets are a healthy weight, veterinarians report that between 30% and 50% of small mammals, cats and dogs are overweight.

Thai pet food industry responds to address temporary US export ban

Thailand's pet food, fish meal and fish oil products have been added to the US Department of Labor's 2024 report that lists goods produced using child labor or forced labor, resulting in a trade blacklisting.

This is expected to impact Thailand's exports to the US, valued at over \$1 billion (€921.1M) each year, and the country's Labor Minister Phiphat Ratchakitprakarn has responded by establishing a committee to address the accusations.

The Thai Pet Food Trade Association (TPFA) and the Thai Tuna Industry Association are actively involved with the newly established committee to provide a response.

According to the TPFA, Thailand exported approximately \$595 million (€548M) in dog and cat food to the US last year. For 2024, the country has set a target of \$2.5 billion (€2.3B) in pet food exports.



India's cat and dog food imports increase 500% in a decade

According to data from the Ministry of Commerce and Industry, India's imports of dog and cat food have more than doubled from \$25.5 million (€22.9M) in the first half of 2019 to \$69.8 million (€62.8M) during the same period in 2024.

Additionally, imports of this commodity have surged over 6 times in the past decade, rising from \$11.2 million (€10M) in the first half of 2015 to their current figure. While pet food imports accounted for 6 million kg in H1 2015, they represent 29 million kg a decade later.

The value of pet food imports, including cat and dog food in addition to food for other animals, for H1 2024 was \$126.41 million (€113.7M). The products mainly came from Thailand, South Africa and Italy.

India's growing pet food industry has also seen a rise in exports. In the first half of 2024, exports reached \$36.4 million (€32.7M) compared to \$18.8 million (€16.9M) before the pandemic. Germany (27%), the US (20%) and the UK (15%) are the top export destinations in 2024.

Between 2023 and 2024, India exported \$59.25 million (€53.3M) worth of dog and cat food globally, significantly higher than the \$36.1 million (€32.4M) exported between 2018 and 2019.

Danes turn to CBD to treat pets

A recent study published in the peer-reviewed journal PLOS ONE in January 2024 revealed that 38% of the respondents in Denmark used cannabinoids – mainly cannabidiol (CBD) – for their pets.

Despite CBD products being unlicensed for veterinary use in Denmark, owners are predominantly using cannabidiol in oils or drops (93%). Only a small percentage of pet parents in the country opt for CBD ointments (9%) or use THC (delta-9-tetrahydrocannabinol) products for their pets (4%).

The study, led by the Faculty of Health and Medical Sciences at the University of Copenhagen, surveyed 2,002 pet parents across Denmark.



Former Fressnapf boss moves to sushi company

Johannes Steegmann is taking on a new role as Chief Executive Officer (CEO) of Cologne-based Eat Happy Group. The company operates a shop-in-shop concept, offering handmade sushi and other Asian specialties at over 3,500 supermarkets in Germany, Italy, Luxembourg, Austria and Slovakia.

“The great thing is that I can bring in my experience from previous professional positions: expansion, branding, product range innovations, CRM, retail media, pricing, transformation,” says Steegmann.

After playing a critical role in developing Fressnapf’s omnichannel ecosystem during his 4-year tenure, Steegmann left his position as CEO of the German pet retailer earlier in the year after the acquisition of Italian player Arcaplanet.



Kölle Zoo and Das Futterhaus go mobile friendly

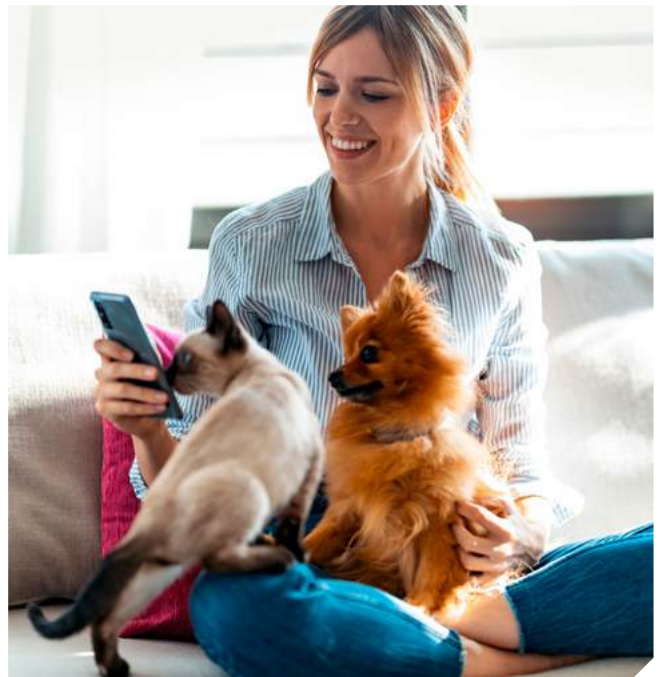
German pet retail chain Das Futterhaus launched its new website in October, featuring a fresh design optimized for smartphones, as part of its efforts to become an omnichannel retailer.

The new platform unifies the retailer’s app, which was launched earlier this year, creating a seamless customer experience and enhancing communication. The initiative aligns with the company’s strategy to improve customer engagement and convenience.

Looking ahead, Das Futterhaus plans to further enhance its digital offerings by adding a shopping function to its website in 2025.

Meanwhile, Kölle Zoo has launched a loyalty app allowing customers to collect purchase points, redeem rewards and donate to regional animal welfare organizations.

Since its launch in June 2024, its customer base has grown to 47,000 users, with more than 33,000 active participants. The company reports generating €5.5 million (\$5.9M) in revenue from the platform, with the average shopping cart value increasing by over 50%.



DATA INSIGHT

\$307 million

South Korean pet food imports declined by 11.4% in 2023, according to the US Department of Agriculture (USDA). This trend could be explained by the growth of local pet food businesses.



NEW APPOINTMENTS



Laroy Group

Thomas van Nielandt succeeds current Chief Executive Officer (CEO) Els Laroy at the Belgian pet food manufacturer. He brings 15 years of experience of working in the sector.



Jollyes

Adam Dury is the new Chief Operating Officer (COO) at the British pet retailer, starting January 2025. He has held commercial roles at supermarket chains Tesco and Marks & Spencer, and gift retailer Card Factory.



Pet Network International

The European pet care platform has promoted Alexander Atanasov as the new Chief Marketing Officer (CMO). He has been the company's Marketing Manager for the past 3 years.

★ TOP 3 INVESTMENTS

★ **1** American farm, home improvement and pet retailer **Tractor Supply** has announced a definitive agreement to acquire online pet pharmacy **Allivet** in a bid to increase its total addressable market by \$15 billion (€13.8B).

★ **2** Veterinary care provider **Petfolk** has received a \$36 million (€33.5M) Series C investment. The company plans to expand its network by around 40 clinics across the US.

★ **3** Dutch pet food player **Premium Petfood Brands** completed the acquisition of organic dog and cat food brand Yarra with the aim of strengthening its position as a supplier of high-quality pet nutrition.

MOST READ NEWS ON THE WEBSITE

Musti Group expands into the Baltics with €18 million acquisition


The acquisition will give Musti access to 46 retail stores, 16 veterinary clinics and a workforce of 472 employees across Estonia, Latvia and Lithuania. The transaction is set to be finalized by the end of 2024.



LATEST NEWS



How predictive and generative AI can drive retail sales



As customers continue to buy online, offering them fast, convenient and personalized experiences is more important than ever. So retailers are embracing artificial intelligence.



Nino Bergfeld

*Director of Retail Advisory
Salesforce*

Innovative technology is a key driver of retail growth and profitability. Retailers are using artificial intelligence (AI) to personalize shopping in physical and online stores. They understand the benefits and are applying the technology to streamline processes, increase productivity and personalize the experiences of both customers and employees.

Getting the right data

Some retailers struggle with the data that feeds AI. It's all too easy to focus too much on operations, internal spreadsheets, and promo-driven loyalty and marketing programs, while forgetting to focus on the customer themselves. That's where data-driven personalization comes in, and AI can help. Using it to enhance a customer journey across all channels, and in the context of a customer loyalty program, means retailers can unlock new opportunities for growth.

Anyone who wants to be successful as a retailer in this new AI world needs to leverage customer data in a secure and reliable way. Pet Supermarket, a Florida-based specialty retailer, uses Salesforce omnichannel technology to enhance the online shopping experience, improving how it serves and interacts with its customers. For instance, it can incorporate inventory from its extensive network of over 200 storefronts into a key competitive advantage against the rising Chinese super-apps like Temu and Shein.

[▶ SEE NEXT PAGE](#)



Predicting stock levels

For market leaders, keeping products on the shelves is a constant challenge. With predictive AI to support their inventory management, they can even go a step further. They can combine current stock with historical data, plus the latest market trends and store locations. Based on this, retailers gain a better understanding of product demand and can adjust their stocks in preparation.

Time management

Automation can save time for both retailers and consumers – that’s obvious. By analyzing consumer behavior, product performance and sales patterns, AI paints a picture of what attracts consumers. So investing in effective merchandising solutions is not only good for efficiency, it also keeps customers happy.

The data provided by the technology also helps companies to design in-store displays and promotional materials. So it saves the time that teams involved in merchandising, marketing and design would otherwise spend on researching and formatting layouts – time they can now spend on making strategic and creative decisions.

Smartphone as remote control

A key technological trend is use of the cellphone as a remote control for shopping. Smartphones instantly connect consumers with brands when they visit online and offline channels. Imagine you’re in a store and

the mobile app goes into in-store mode, for you to see what’s in stock, browse store promos and hear about bring-your-pet-to-the-store days, to name just a few benefits.

Mobile apps are also becoming increasingly important for connecting sales channels, with features such as digital loyalty cards. And marketers are embracing alternative communication channels to engage people wherever they are.

For example, sending messages via push notifications, streaming services and text messaging using WhatsApp or Kakao Talk. The volume of these messages is rising faster than growth rates of traditional emails have been. And with AI, the messages are automatically generated.

Anyone who wants to be successful as a retailer in this new AI world needs to leverage customer data in a secure and reliable way.

Not only are the places and the ways customers shop changing, but also the ways they pay. The best example of this is the growing popularity of digital wallets – with applications such as Apple Pay, Google Pay and Amazon Pay. Alternative payment methods at online checkouts are proving useful in dealing with the pressures of inflation and shrinking budgets.

Personalized and seamless experiences

Generative AI and predictive AI enable retailers to personalize every moment in the customer journey with a data-driven approach. Personalization gives brands the power to turn every shopping interaction into a meaningful and rewarding experience, from recommending the perfect gift for a friend to finding the best deal on a new gadget. Those shopping experiences are essential to customer engagement, retention and loyalty in today's retail landscape.

One retailer in the pet world that really knows its audience is the Reddy store in New York. As you walk in, not the customers but the dogs are warmly greeted by name. And it knows exactly what those dogs like and need.

Customers might just run into a celebrity who has come in for a gourmet meal – at a matching price – for their dog. It is the community aspect of consumer loyalty that has a considerable part to play at the store. People don't only go to Reddy for products for their dogs. It's also very much about the friends they (and their dogs) are making there.

Trust is crucial

Increasing productivity and profits with AI should not come at the expense of consumer trust. Customers are concerned about its impact on society, fearing bias and

unintended consequences. To counter this skepticism, transparency and proactive communication are key.

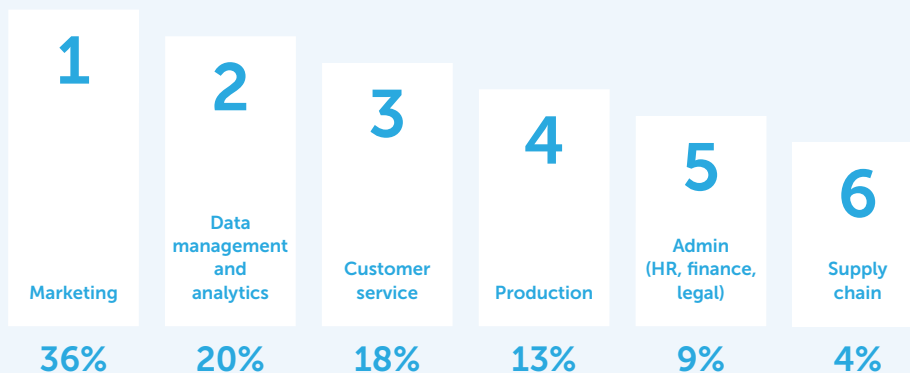
Customers need to know that company employees – rather than the technology – are still at the wheel. Upskilling is therefore important too. Only then will teams learn how to use data while keeping the data sources and first-party data secure.

Long-term thinking

As a retailer, whether you want to increase your revenue or just work more efficiently, always put improved customer experience at the heart of whatever you do. And dare to look into the future. Develop a long-term strategy for your top 3 segments. Attach a 2-year program to this – be clear which segments you want to address with which message in which channel, and how you want to develop them. Next to this, real-time personalization is crucial too. Don't show your returning VIP shoppers the same generic website – personalize banners, products and content.


Rewarding loyal customers will help you retain them, rather than losing them to competitors. In fact, you just can't spell retail today without AI. In marketing, including merchandising and customer service, technology is set to make an ever-greater mark on profits, productivity and loyalty. AI is going to change retail and commerce forever. ♦

In what part of the business do you use AI?



Source: GlobalPETS newsletter industry poll, September 2024 (n=55)





The powerful potential of artificial intelligence for pet healthcare

Advanced technology is bringing change to the health sector for pets, as it begins to have an impact on monitoring, diagnosis and treatment.



Joy Nelloolichalil
Contributor
PETS International

The current shift toward pet care driven by artificial intelligence (AI) involves early detection as well as better health management. These new applications address some of the current limitations of traditional pet healthcare practices.

One pet, one profile

The most notable advances in AI for pet care are the development of wearables and health monitoring apps. PetPace in the US is a leading player in this field with its smart collars for dogs. These have been on the market since 2016, and the company says that the idea behind AI-powered collars arose from a common frustration in veterinary medicine: diseases being discovered too late.

Most PetPace users are owners of older dogs – some of whom already have a medical condition. Each device is equipped with an array of sensors and backed by algorithms that can accurately monitor a range of pet biometrics, including vital signs, behavior and location. “Each dog’s collar is collecting data continuously. We’re sampling data almost twice per second,” Dr. Asaf Dagan, Chief Veterinary Scientist at PetPace, explains.

The company creates a personalized biometric profile for each pet. This gives a unique and accurate representation of the pet’s current health. If anything changes, i.e. the dog starts to develop a disease, AI detects and flags deviations from the baseline profile.

The technology is also able to compare a pet’s data to that of other animals with very similar characteristics, such as breed, age and size. This helps to determine whether the dog is as healthy as it should be.

Early diagnosis

South Korea-based AI For Pet uses a different approach for its TTCare app, making use of advanced image recognition algorithms to assess clinical signs. By analyzing photos of specific body parts such as eyes, teeth or skin, or videos of an animal’s gait, it can detect signs of common conditions such as infections, dental issues and skin disorders.

The app’s technology was trained using over 2.5 million health scans from veterinary hospitals worldwide and validated by experts at Seoul National University and Ohio State University. The preliminary diagnosis that the app provides can help veterinarians or pet service providers identify potential health concerns at an early stage.

Growth but also concerns

According to business consulting company Grand View Research, the global market of AI technology in pet health was estimated at \$997.3 million (€895.7M) in 2022. This is expected to grow at a compound annual growth rate of 19% until 2030.

The pandemic created an urgent need for remote pet healthcare solutions, as visiting clinics became more difficult. "We saw a significant increase in the use of our AI technology by both pet service providers and clinics," says Euna Huh, CEO at AI For Pet. According to company data, application of its AI tools increased by 45% between 2020 and 2022, with a 60% increase in remote consultations based on AI-powered health checks.

This rising popularity is at the same time a concern for key industry players. Dr. Dagan from PetPace warns that AI is becoming a buzzword that everyone uses to market their products. "To genuinely qualify as AI, you need vast amounts of data. You can't make a diagnosis on just a few data points. It also requires advanced analytics, algorithms and models that go beyond basic statistics."

The latest innovations

PetPace recently launched a pregnancy tracking program designed for dog breeders. Besides healthcare applications, the company has been working on an earthquake warning system using its smart collar technology. Studies show that animals often behave differently prior to earthquakes, with dogs particularly sensitive due to their acute senses. The project is currently in its second phase in Peru, a country known for seismic activity.

Similarly, South Korean businesses are innovating in other ways to incorporate AI into pet care. This includes smart leashes that track body temperature and pulse, plus smart toilets for early identification of urinary tract infections. With government-led programs to spur expansion, South Korea hopes to grow its pet healthcare market into a \$15 trillion (€13.5T) sector by 2027. ♦

The idea behind AI-powered collars arose from a common frustration in veterinary medicine: diseases being discovered too late.

New in the SoftCat line

SoftCat[®] WITH YUCCA



LONG LASTING



SUPER
ODOUR CONTROL



COMPOSTABLE



Schulze Heimtierbedarf GmbH

Osterkamp 11 | 32457 Porta Westfalica

✉ info@portapet.de

☎ +49 5731 98200-0

PALATANTS. SOLUTIONS. SERVICES.

AFB is more than just palatants. We provide custom solutions to improve pet food palatability. Our services are tailored to the specific needs of each customer. We can partner to meet their objectives while making pet food taste great!



To learn how AFB brings value to pet food companies through research expertise, technical support and unparalleled customer service, visit afbinternational.com or contact your AFB account manager.



Ellinor Persdotter Nilsson, Chief Commercial Officer, Musti

“Our own brand offering has the potential to expand beyond the Musti universe”



After recently becoming part of multinational business group Sonae, the leading Nordic pet retailer is laying out ambitious plans for its future.



David Palacios Rubio
Editor-in-Chief
GlobalPETS

Leading regional pet care group Musti currently has 351 stores in the Nordic countries, and that number is growing. At 138 stores, Finland is its largest market, while it has 132 locations in Sweden and 81 in Norway. As Musti ends its 36 years as an independent company, CCO Ellinor Persdotter Nilsson talks about the company’s achievements as well as Musti’s current and future strategies under the Sonae umbrella – and she envisages plenty of fresh opportunities for the business.

You’ve been with Musti since 2018. How has this 6-year journey been for you?

I must say that it’s been very exciting. Working with a really passionate consumer group makes it such a fun experience. We genuinely feel like we are making a big difference for pets and their parents every single day.

It’s also exciting because, as a company, we’ve grown significantly since I started. We’ve doubled in size and

nearly doubled the number of stores we operate. We’ve built our operation in Norway from a start-up to the current market leader, and we are continuing to open more stores there. Now we’re embarking on a new adventure with new ownership.

Where does Musti fit into the pet retail ecosystem in the Nordic countries?

We are the market leader in the pet space in the Nordics, particularly in pet specialties. I think we’re front runners in the whole sector, which comes with a lot of responsibility but also a lot of excitement.

We have this unique position where we operate under a dual-banner strategy. In every market, we have both an omnichannel banner and a pure-play banner.

In Finland, for example, we have Musti ja Mirri – both a store concept and an online channel – as well as a pure-play channel, which operates mostly online with 6 physical stores. This allows us to cover many aspects of the market and serve a broad range of customers.

[▶ SEE NEXT PAGE](#)

“Musti ja Mirri is a true pet specialty concept. The assortment is carefully selected by our pet experts, and we have a high share of our own products.”

How is this dual-banner approach working for you and your customers?

We’ve seen that the concept works really well because we’re serving different customer groups. With Musti ja Mirri, we say that our selection starts where grocery ends. It’s a true pet specialty concept. The assortment is carefully selected by our pet experts, and we have a high share of our own products. We also offer many services, including digital and physical training.

In Sweden, we have a veterinary clinic chain under the Arken Zoo brand, which is the equivalent of Musti ja Mirri in Finland. On the other hand, our pure-play channels, which are primarily online, have a wider assortment which includes some grocery brands. They are more focused on fast deliveries. It’s a different kind of offering that caters to a different consumer group.

How does your traditional retail compare to your online offering in regard to stock keeping units (SKUs)?

Our SKU count doesn’t differ significantly between online and offline. However, most of our omnichannel sales come from physical stores, and our average store size is around 350 sq m. So, naturally, the SKU count in-store is more limited compared to the wider assortment offered in our pure-play online channel.

We have between 13,000 and 14,000 SKUs available online, although that’s obviously nowhere near the case in our traditional retail stores. In an average 350-400 sq m physical store, we would usually carry between 3,500 and 4,000 SKUs.

Are there any differences in product demand across the different countries where you operate?

The reason our concept works so well across the Nordics is that there are very few product selections that wouldn’t work across all regions. Pet parents in the Nordic countries are quite similar, so what they buy is too. Since there are more cats in Sweden, those types of products are more popular. Items for outdoor activities – like trekking with your dog – are more popular in Norway than in Sweden and Finland.

Can you describe the average journey of the Musti customer?

Our loyalty program is central to the customer journey, with almost 1.6 million customers across the Nordics. Many customers have multiple pets, but our loyalty program tracks the pet owners. We actively work with breeders, as they are an important customer group. And our Puppy and Kitten Club, launched in 2020, is key to attracting new pet parents.

A typical customer journey begins when someone gets a new pet, and they may interact with us for the first time through our stores. But our top-tier customers tend to use both our physical stores and our online services, including training and grooming. We offer physical as well as digital dog training, and have 125 grooming salons located in or near our stores.

As the market leader, how do you operate alongside competitors in the Nordic region, including online?

We are market leaders in all 3 countries, but our share of the market varies: in Finland, it’s just over 30%; in Sweden, around 25–26%; in Norway, about 15–17%. In Norway, we have not yet consolidated our position in the market, which is even more fragmented than Sweden and Finland, where we have been active for longer.

What is your plan for growing Musti’s footprint in Norway?

When I started 6 years ago, we had around 15–16 stores in Norway, and now we have over 80. We still see room for growth, through new store openings and by ramping up existing stores. Our goal is to engage customers, both in physical stores and online, and grow their share of wallet. The real magic happens when customers meet store staff – they trust our experts.





Tell us about your average store...

Our store network is very diverse, so it's difficult to define an average size – with stores ranging from 100 to 1,000 sq m. Locations include retail parks, city stores and larger stores. It's important for us to be where the consumer is, so we adjust our assortment and the services we offer to the location. In areas where we have multiple stores, we tailor the offerings for each one.

Where do you want to be present as a brand?

We have a presence in both big cities and smaller towns. It is key that we're right there where our customers are. Retail parks work well for us, as they offer ample parking and allow us to welcome pets into our stores. We have various types of locations, but it's important to ensure good customer flow and convenience for pet owners.

How is current low consumer confidence impacting Musti's business?

We've seen softer trading in some categories, particularly accessories, but 75% of what we sell is food and consumables, which remain frequent purchases. It's essential that we continue to refine our product offering, focusing on both high-end innovative products and more budget-friendly options.

We've noticed more consumers looking for promotions and discounts, and offers we've had for years are now resonating even more due to inflation and rising prices.

Given the shift in consumer behavior, are you also expanding your private label offering to meet the increased demand for value products?

At Musti, we don't use the term 'private label'. We talk about 'own brands', which are developed to fit into our 'good, better, best' structure. While all our products are of high quality, this approach helps us cater to a range of price points.

In the more budget-friendly 'good' category, we're filling more gaps than before by developing new products, textures and packaging. Over 50% of our sales come from our own exclusive ranges, and we're constantly expanding these to remain relevant, especially in the current economic climate.

Musti was recently acquired by Sonae for \$1 billion (€0.92B). How is this going to impact your business in the short term?

The new situation presents numerous opportunities for inspiration and benchmarking in retail innovation. We're looking into possible synergies with Sonae's own pet specialty chain, which has 60 stores. Our strong brand offering also has the potential to expand beyond the Musti universe, so brand export is an area we're exploring. International expansion is also part of our growth journey, and this investment indicates confidence in our potential.

With such a significant investment, how do you plan to maintain Musti's identity and focus in the Nordics?

The investment reflects the trust in our expertise as pet specialists. It's crucial for us to maintain our identity and continue serving pet parents and their pets in the Nordics. We still see room to grow market share, especially in Norway and Sweden. Our new owners want us to focus on this, while also exploring new avenues for growth, such as collaboration with other retail chains and market expansion.

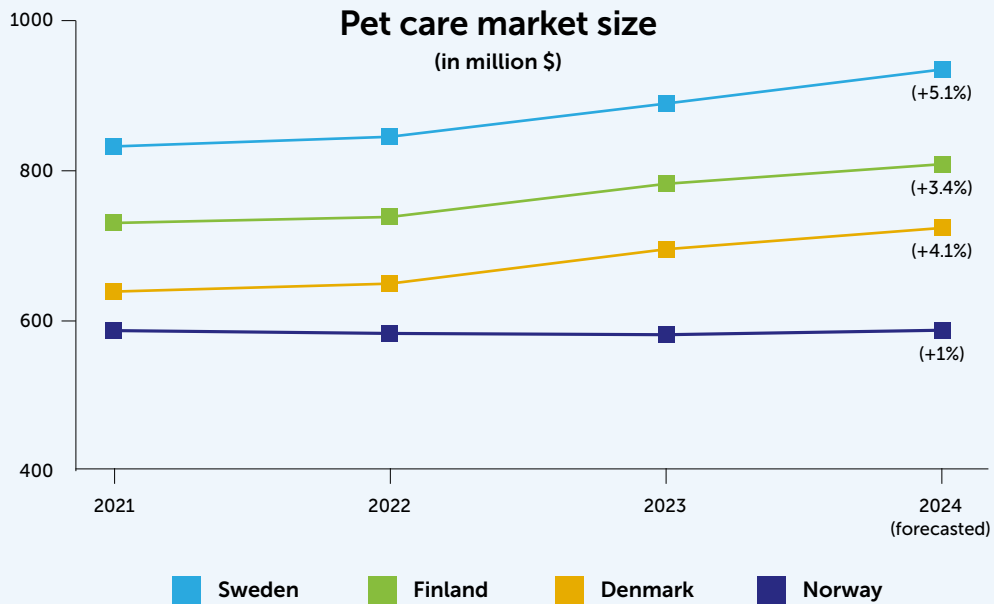
You recently announced the acquisition of Baltic pet retailer Pet City for €18 million (\$19.5M)...

While recent investment has been primarily in Finland, our acquisition of Pet City is in the Baltics, which shows our interest in geographical expansion. With 46 Pet City stores and 16 veterinary clinics in the region, we see significant potential for sharing best practices. The pet parenting trends in the Baltics are quite similar to those in Finland, so we believe there's a natural synergy that can be leveraged.

Is expanding the Pet City footprint in the Baltics part of your future plans?

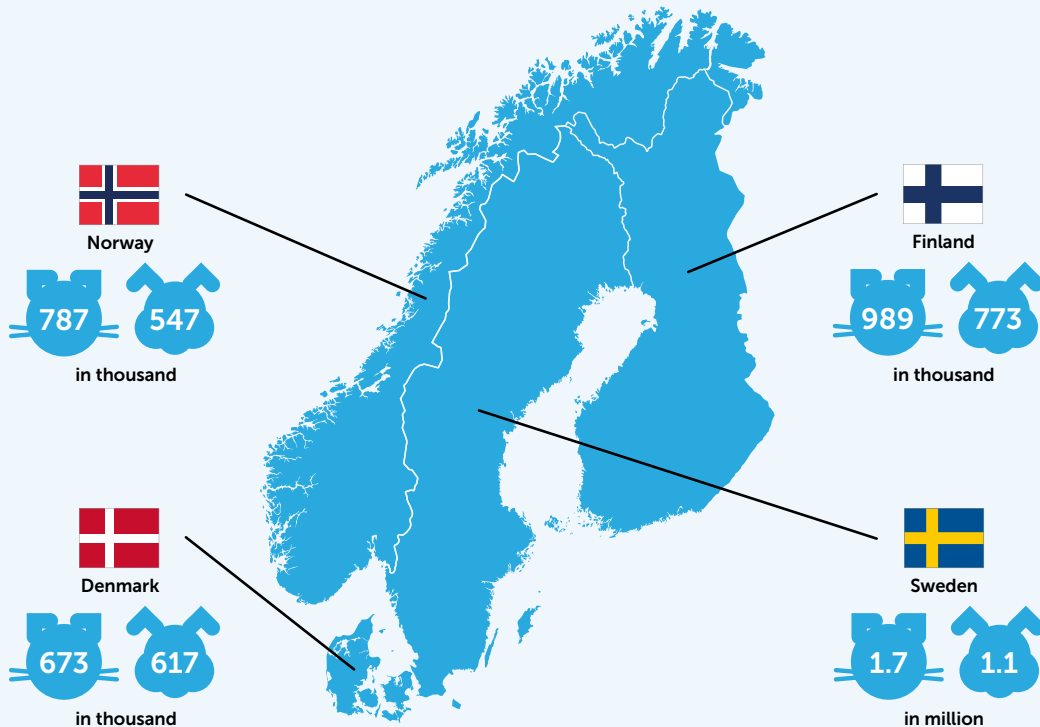
We always aim to grow, but our immediate focus will be on sharing best practices and collaborating effectively. Once we have established ourselves there, and laid all the groundwork, we can go on to explore further expansion opportunities. ♦

The numbers behind the Nordic pet industry



Cat and dog population

(2024)



Nordic consumers embrace raw diets for their pets

The raw food trend has been growing across Denmark, Sweden, Norway and Finland for the past 2 decades. How are local manufacturers investing in research and innovation to drive further expansion?



Jessica Suni
Contributor
PETS International

The demand for fresh and raw dog food has surged globally in recent years, and the Nordic countries are no exception. This rise is largely driven by increased interest among dog owners in the possible benefits of a more natural, raw-material-based diet. Influenced by trends in human nutrition and the push to reduce ultra-processed foods, many people are seeking these options for their pets.

Growth trajectory

Biologically appropriate raw food (BARF) typically consists of meat products, organs and frozen items. Within the raw food segment, this also includes supplements as well as freeze-dried and air-dried options, which are notable for not being heat-treated. According to customer feedback, raw-fed dogs experience glossier fur, healthier skin, better digestion and improved appetite. They also show stronger paws, firmer stools and more stable energy, and recover more quickly from injuries.

BARF has been a growing trend in the Nordic countries for the past 2 decades. Apart from in Sweden, national brands tend to dominate their respective markets. For example, Finnish company Snellman Petfood is the largest manufacturer of raw food and one of the largest dog food manufacturers in the Nordic countries. Its market share is over 50% of frozen BARF food in Finland, and also in Sweden.

The company exports around 10% of its products to other countries, mainly to Denmark, Germany and Hungary. "The demand is rising in all markets, including in the Nordic countries. In Finland, the growth has been between 10 and 20% a year since we started 20 years ago," Snellman Petfood's CEO Magnus Petterson tells PETS International.

Standout brands

In Norway, local market leader VOM og Hundemat has a loyal customer base with a preference for Norwegian products. At the moment, the firm exports around 20-30% to 13 different countries and sees great potential for future growth. "The market for raw food in the Nordics is experiencing an

[▶ SEE NEXT PAGE](#)

Pet Foodie

Real meat, Real joy

**Frozen fresh meat
for dogs and cats**

**Easy to serve
Quickly defrosted
No nasties**



q-petfood.com

increase in small-scale producers, which creates a more varied competitive situation. Our 20 years of experience in the industry, on the other hand, strengthen our position as a reliable choice for consumers who value quality and expertise," says CEO Ole Magnus Østby.

VOM and Snellman Petfood have both emerged as standout brands in Sweden, capturing significant attention. Carl Haglind, CEO of VOM Sweden, estimates that BARF companies account for around 5% of the total market revenue, with the rest coming from dry food and wet canned food.

However, he points out that there were hardly any BARF products on sale 15 years ago. "There were maybe 5 or 6 suppliers, and the industry was very underdeveloped. So in that sense the market has grown, and we have taken a large market share. During the past few years, it might have stagnated, but it is still growing," he states.

Strong focus on research

Unlike the commercial dry food industry, which frequently introduces new ingredients in response to trends, the raw food segment has not seen as many shifts in this regard. However, there has been a strong focus on scientific research (see box).

There is a growing demand for raw dog food free from common allergens, causing the BARF industry to search for new protein sources.

Snellman Petfood is one company that has long supported research into how different feeding methods affect the well-being of dogs. Recently, the company made a significant donation to the University of Helsinki's DogRisk research team, which studies the impact of dogs' eating habits on their health and longevity.

Downsides of ultra-processed food

Pettersson explains that an increasing number of pet parents are turning to BARF for their cats and dogs, driven by research that highlights the health risks associated with refined and ultra-processed foods. "Cats and dogs consume by far the most ultra-processed food of all animal species. In comparison

to other animals, they tend to be sicker, and veterinary costs are higher. These challenges are part of why BARF is gaining popularity," he says.

He adds that the meat preferences are pretty much the same across the Nordic countries. People tend to feed their animals the same kinds of meats they eat themselves: chicken, beef, turkey and pork, he says. Some people ask for reindeer, deer and rabbit, but those meats are a lot more expensive to acquire than beef or pork. According to Pettersson, consumers' wishes might be more exclusive than what they actually buy in stores.

Avoiding allergens

Meanwhile, there is a growing demand for raw dog food free from common allergens, causing the BARF industry to search for new protein sources. "Dogs are experiencing something similar to what humans went through 20 years ago during the allergy boom among children. Everyone is trying to find a protein source that no one else has," Haglind notes.

To make it easier for people to access and use raw food, during the last 2 years Snellman Petfood has invested in freeze-dried products. These are considered suitable for the BARF segment since they are not heat-treated but dried under negative pressure. This method preserves vitamins, enzymes and proteins, while maintaining the taste and nutritional values of the food.

The product series is called Vaisto and is presented as a lightweight, compact and convenient alternative for raw food diets. It preserves the quality of fresh raw food while being easy to transport, making it ideal for trips, competitions or hikes where freezer access is limited.

Investing in innovation

But for Pettersson, the most important trend and innovation in BARF is to make the food more natural by reducing the amount of processing involved. As the company's most recent major innovation, he mentions the Hellä series with fermented vegetables, launched a few years ago. This uses a fermentation process in which 2 different types of lactic acid bacteria and fermented vegetables are mixed in with the raw meat. Adding fibers and oils, and striving for a better omega-3 and omega-6 balance, are all part of the development process.

[▶ SEE NEXT PAGE](#)



VOM Norway has also made significant investments to meet the increasing demand for raw food, focusing on advanced production technology and modern machinery to enhance both efficiency and quality. “For example, we have invested in freezer spirals for all products, so that the finished goods will be frozen faster, which is also positive for the quality of the product,” comments Østby.

“The production machines have also become more efficient and we are able to produce all-fresh products faster than before, again to extend the shelf life with the customer,” he says. Moreover, the company has expanded its cold storage capacity with a new 600 sq m facility, ensuring a stable supply of raw materials and finished products.

Further expansion

In Sweden, VOM is working to expand its customer base by entering the grocery trade, which is a relatively new market for raw food in the country. “We are making substantial investments to reach beyond the zoo shop customers and into mainstream grocery stores,” says Haglind.

BARF producers are also exploring innovative packaging solutions to enhance their products. Some packaging now mirrors the design of meat products for human consumption, and manufacturers are considering how to tailor these packages to suit a wide range of dog breeds. ♦

Research into the benefits of BARF diets

A study published by *Frontiers in Veterinary Science* in 2023 suggests that early life factors, particularly diet, may influence a dog’s risk of developing otitis later in life. Dogs fed a raw, non-processed meat-based diet (NPMD) had a lower risk, while those on an ultra-processed carbohydrate-based diet (UPCD) were more prone to otitis. This effect was observed both in the mother’s diet during pregnancy and in the puppy’s diet from 2-6 months. Puppies consuming over 25% NPMD had a reduced risk, while those with more than 75% UPCD had an increased risk.

Factors such as sunlight exposure and being raised on a dirt floor also appeared to lower the risk. More research is needed, but adjusting diet and environment may help prevent otitis in dogs.

Another study suggests a potential protective link between fish fat in a dog’s diet and reduced epilepsy risk, though other feeding factors may play a role. The findings tally with existing knowledge on omega-3 fatty acids and ketogenic diets as supportive treatments for epilepsy. However, as the results are observational, dietary intervention studies are needed to confirm causality.



Kormotech UKRAINE

How Delickcious turns mealtimes into moments of shared joy and love

Kormotech has unveiled its new range called Delickcious, which includes soups, desserts and everything in between.

At Kormotech, they understand that a happy pet makes for a happy owner. Therefore, Delickcious is aimed at being more than just pet food. It's about delivering an enjoyable mealtime experience for pets.

Based on carefully crafted recipes, Delickcious provides meals that pets enjoy while also giving them the nutrition they need. Whether it's a full meal or a special treat, the brand's focus is on providing a pleasurable and satisfying experience for even the pickiest eaters.

A commitment to quality and variety

Delickcious offers a variety of flavors and textures, with products ranging from soups and drinks to light, creamy snacks designed to appeal to pets of all ages. The ingredients in the brand's line-up include berries and other fruits, vegetables, and various types of fish and meat, all thoughtfully combined to create meals that pets will love.

By using only premium ingredients, Kormotech ensures that its Delickcious products are not only delicious, but also provide balanced nutrition. This results in a complete and healthful dining experience for pets.

Designed for health and happiness

Each product in the Delickcious range goes beyond just flavor; it also offers health benefits. Ingredients like omega-3 and omega-6 fatty acids promote healthy skin and shiny fur, for example.

In addition, Delickcious drinks help maintain hydration. Meanwhile, the soups – fortified with zinc, iron and vitamin D3 – contribute to a pet's overall health and longevity. As a result, owners can be confident that they are offering their pets food that not only tastes good, but also supports their well-being.

Strong debut at Interzoo 2024

Delickcious made a strong first

impression at the Interzoo 2024 exhibition, where its vibrant packaging and focus on high-quality pet food caught the attention of attendees. The brand's playful and practical approach resonated with visitors, and received lots of positive feedback.

European market expansion

From November onwards, Delickcious will be available in Ukraine, Romania, Lithuania and Poland, with plans for further expansion across Europe.

The brand's strategic rollout reflects the company's goal to bring high-quality, flavorful products to pet owners across the continent.

For partnership opportunities, interested parties can reach out to Kormotech to explore the potential of bringing Delickcious to new markets. ♦

Kormotech LLC

delickcious.eu

The future of the global pet sector

How is the market shaping up to perform over the next 5 years? A recent report helps to identify the key trends to look out for.



Diana Rosero-Pena
Equity Research Analyst
Bloomberg Intelligence



Ann-Hunter van Kirk
Senior Equity Research Analyst
Bloomberg Intelligence

According to Bloomberg Intelligence's (BI) Global Pet Economy 2024 report, strengthening smaller markets and a growing healthcare segment may increase the global pet economy by 5-6% to over \$380 billion (€352B) in 2025. A bigger pet population and continued humanization could push this up to over \$500 billion (€463B) by 2030.

US and Europe snapshot

The US remains the biggest region in the global pet economy, with 40% of industry sales. It is projected to reach over \$150 billion (€139B) in 2025 and closer to \$200 billion (€185B) by 2030. The growth may not be equally distributed, as economic challenges have made some pet owners cautious about spending.

Europe will continue to be the second largest region through 2030, making up a third of the market and reaching \$131.3 billion (€121.6B) by 2025 and \$164.7 billion (€152.5B) by 2030. These numbers will likely be driven by global trends, although the population mix (cats vs dogs) may differ.

In 2025, BI estimates that 54% of the European pet population will be cats, compared to 49% in the US. Having a pet in Europe is cheaper than in the US, with the annual cost of owning a dog calculated at €739 (\$798) and owning a cat at €500 (\$540). Across the Atlantic, this is estimated to be over \$1,700 (€1,574) and \$1,000 (€926) respectively.

China and other regions

The pet market in China is on course to increase by 6.6% to \$37.4 billion (€34.6B) in 2025. The country will remain at about 10% of the total global market through to 2030, growing an average of 6% annually to reach \$49 billion (€45B). This is almost double the country's GDP forecast.

Like other emerging markets, it is rising pet ownership in China, along with shifting demographics – as well as the many different offerings of pet food, products and services – that will be key catalysts for the industry.

Cats will likely be favored over dogs, as authorities continue to tighten the regulations on dog ownership and breeding.

Analysis suggests that diagnostics could expand to an addressable global market of more than \$35 billion (€32B) by 2030.

The pet industry in Latin America, Asia and Africa could reach \$98 billion (€91B) in 2025, representing a 7% annual increase, and grow at a compounded average rate of high-single digits to \$137.8 billion (€127.6B) by the next decade.

Global pet food segment

Food is set to remain the biggest pet expense. Despite economic sluggishness, the segment is projected to reach over \$110 billion (€102B) globally in 2025 and \$146 billion (€135B) by 2030. This is due to a larger pet population – particularly since the pandemic – and continuing humanization, plus the limited elasticity that has allowed food producers to pass along increases in labor and commodity costs in the past couple of years.

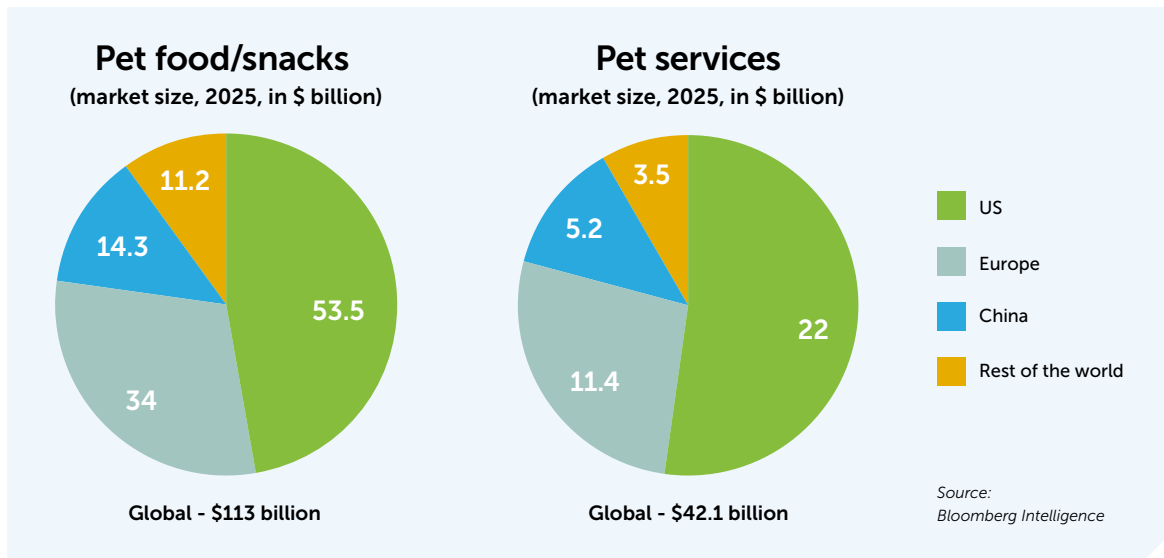
Big food companies such as Nestlé, Mars, Post Holdings and General Mills will remain leaders in the pet space, with limited opportunity for transformative M&A in 2025, although smaller purchases to complement portfolios might not be completely off the table.

Health-focused food

Premium products will outpace the overall pet food market in 2025, as ingredients that have dominated human food in the past 10 years make their way into the industry. Heightened awareness of the health benefits of using better quality food to extend a pet's life and delay expensive healthcare treatments down the road, is another success factor.

[▶ SEE NEXT PAGE](#)





Sales in the premium food sub-segment in the US may rise to as much as \$3.5 billion (€3.2B) by 2030 – a 20-25% annual growth projection. This is despite some capacity constraints, as manufacturing expansion has slowed to improve profitability.

Conversely, snacks are unlikely to follow the same pattern as food overall, given that they're perceived to have limited nutritional value so cannot really be used to replace meals. As such, BI expects that snack sales in the US will remain at a quarter of all pet food revenue, up 36% to \$15.5 billion (€14.4B) by 2030, while food for main meals will increase by 52%.

Rewards of healthcare innovation

Healthcare may be the largest contributor to growth in the market. Pet pharmaceuticals will potentially top \$24 billion (€22B) globally by 2030, as improvements in nutrition lead to longevity, and aging pets – like older humans – require greater care. At the same time, complex and expensive therapies seeking to extend life are becoming more common.

Longer lifespans, as well as an increased willingness by owners to spend on the pets they consider to be part of their family, may fuel pet pharmaceutical innovation in more complex and expensive therapeutic areas such as cancer, osteoarthritis, cardiology and renal disease.

BI believes these specific markets could produce over \$5 billion (€4.6B) in revenue by 2030. With cancer as the

leading cause of death in both dogs and cats, at 47% and 32% respectively, pet oncology in particular could generate close to \$800 million (€741M) by the end of the decade.

Large parasite protection category

E-commerce rising to nearly 30% of total pet consumer sales, and the ease of free auto-ship subscriptions, has driven increases in parasiticide compliance.

Parasite protection is currently the largest pet health category by revenue. The global market for parasiticide products may well expand by more than \$700 million (€648M) to over \$7 billion (€6.5B) in 2025, potentially boosting sales for Zoetis', Elanco's and Boehringer Ingelheim's oral anti-flea/tick/worm combinations.

Huge potential for diagnostics

Another BI projection is that longer pet life expectancies will boost the use of diagnostics. Analysis suggests that this could expand to an addressable global market of more than \$35 billion (€32B) by 2030, rising from \$25 billion (€23B) this year. Increases in diagnostics are likely to flow back to increased pharmaceutical use based on earlier diagnosis of pet diseases.

China will remain at about 10% of the total global market through to 2030, growing an average of 6% annually to reach \$49 billion (€45B).

E-commerce in the US

Greater investment by pure-play retailers such as Chewy and Amazon, aimed at eliminating friction in the sales process and expanding pet consumer spending beyond merchandise, may enable US e-commerce sales to reach \$37.8 billion (€35B) in 2025. This is a 36% gain compared to 4 years ago and could comprise a quarter of overall pet industry sales.

Price competitiveness remains pivotal for the pure-play format to further develop, although Chewy is targeting a greater share of consumer wallets by expanding into compound medication, insurance and veterinary services. After 2025, the industry could gain in the high-single digits annually to reach \$58.4 billion (€54.1B) by 2030, on its way to becoming a third of all pet consumer spending.

Online purchase drivers

Promoting benefits such as better price and free shipping could allow for greater e-commerce penetration. In a BI survey among US pet owners conducted by consumer research platform Attest



earlier this year, over 60% of respondents noted that free shipping and discounts were the main reason to do more of their purchasing online.

Convenience remains a key factor driving consumer preference for pet retail platforms. Specialty stores such as Petco and PetSmart leverage their ability to provide an array of services – grooming, healthcare and training – under one roof, allowing them to expand their share.

In the BI survey, 27.2% of respondents said they use specialty retailers for their pet supplies. This is up from 23.3% last year and tops the 26.9% for mass merchants, which is down from 27.5% in 2023. ♦



EASY RIDE

2 IN 1 HARNESS FOR HANDS-FREE WALKS

EXPERT

- Integrated leash retractor
- Safety brake
- Side buckles: easy to put on



5 sizes
3 colours



Approved
by a vet



Hands-free
walk



Reflective



zolux.com





Farm Company ITALY
Strolling in deluxe with Farm Company

Farm Company launches the 2.0 version of its Nylon Deluxe range of functional collars, harnesses and leashes.

The revisited version includes an extra padded handle on the Secur-Fit harness to allow pet parents to have increased control of their dogs, reflective inserts on nylon tape, and a multifunctional leash that can be used either for training or running.

Farm Company Srl
 info@farmcompany.it
 farmcompany.it



Yantai China Pet Foods CHINA
Chicken/tuna stew wet cat food

- ◆ Grain-free, with no artificial colors, flavors or preservatives
- ◆ 100% real meat for high palatability
- ◆ High-moisture supplement to help support healthy hydration

Yantai China Pet Foods Co., Ltd.
 pam@wanpy.com.cn
 wanpy.com.cn



VET PLANET POLAND
STIMUDERM ULTRA – 79% of dogs show visible improvement in hair regrowth!

STIMUDERM ULTRA is an innovative veterinary program for dog skin and coat care with excessive hair loss of various origins (alopecia, shedding). Its unique formula is based on the ACTIVE NTM® molecule – a substance of vitamin origin with a scientifically proven effect.

The effectiveness of STIMUDERM ULTRA dermotherapy is proven in clinical research (research conducted by J. Karaś-Tęcza, DVM on group of 75 dogs) – after 8 shampoo baths and regular serum application, the visible improvement in hair regrowth was confirmed in below listed patient groups:

- ◆ alopecia caused by atopic dermatosis (71%),
- ◆ excoriations caused by dermatomycosis (79%)
- ◆ alopecia caused by hypothyroidism (67%)
- ◆ alopecia caused by adverse food reactions (71%)

STIMUDERM ULTRA is a Comprehensive Integral Dermoprogram consisting of serum and shampoo (for long-haired or short-haired breeds).

VET PLANET
 m.polak@vetexpert.pl
 vetplanet.org/en



Golden Eagle FINLAND
Holistic Large Breed Adult formula

Golden Eagle Holistic Large Breed Adult is designed for large and giant breed adult dogs!

Balanced dry dog food that contains selected, high-quality sources of proteins and carbohydrates as well as healthy vegetables and fruits without chemical preservatives, flavors or coloring agents.

Contains the unique holistic pre- and probiotic supplements BioHealth™ and LactoHealth™.

Golden Eagle Petfoods Ltd Co.
 info@goldeneaglepetfoods.com
 goldeneaglepetfoods.com



Himadriyati Food Products INDIA
Himalayan cheese chews in natural flavors

Our popular artisanal Himalayan churpi bars, now with the goodness of other natural ingredients that our dogs relish and adore. Available in many flavors including pumpkin, apple, turmeric (curcuma) and peanut butter. Please contact us for more information and even custom-made flavors. Shipping possible worldwide.



Himadriyati Food Products Private Limited
 purbali@himadriyati.com
 himadriyati.com





NATURE'S WAY TO PET WELLNESS

AptiStrong PFS Oral liquid supplement Natural appetizer and digestive tonic	BoneForte PFS Oral liquid supplement For optimum growth and healthy bones	BreathNorm PFS Oral liquid supplement For normal respiratory functions and easy breathing
Cardi Tone PFS Capsule For normal cardiac functions	DefensePlus PFS Oral liquid supplement For strong immune-competence	Dermanol Cream Herbal dermatological cream
DeStress PFS Oral liquid supplement For stress relief in pets	GitNorm PFS Oral liquid supplement For stable and healthy gut function	LiverUp PFS Oral liquid supplement Metabolic and liver care supplement
MobiHealth PFS Capsule For freedom of movement	NatHaem PFS Oral liquid supplement Bio-efficient organic iron complex	ProstaFit PFS Capsule To protect and restore prostate health
SkinHealth PFS Oral liquid supplement For skin health	TifiBan Coat cleanser Skin is the mirror of body condition	UriNorm PFS Oral liquid supplement Kidney tonic



Smart solutions for optimum health of companion animals

Please send your enquiry to

✉ anganroy@indianherbs.in 📞 +919903084749 🌐 www.indianherbs.org





Livalta UNITED KINGDOM
The power of faba

In pet food, functionality is crucial for meeting nutritional needs while ensuring the right taste, texture and consistency.

Livalta understands the challenges and opportunities of plant-based proteins. Their faba protein Livalta Faba P60 offers over 60% protein content and a well-balanced amino acid profile. It not only delivers proven functionality such as binding, emulsifying and gelling, but also aligns with Livalta's standards for sustainability.

Livalta, an AB Agri company
 katarzyna.swirkowicz@livalta.com
 livalta.com

Unleashing the benefits: family dogs and children's physical activity

Gaining or losing a family dog impacts children's physical activity, with the effects more noticeable among girls.



Emma Adams
Research Officer
The Kids Research Institute Australia

As we contend with rising rates of sedentary behavior among children, initiatives that encourage active lifestyles, such as walking and playing with the family dog, warrant further exploration and support.

Breakthrough research

Research by the Telethon Kids Institute and the University of Western Australia is the first to examine the longitudinal effects of dog ownership on children's movement behaviors. Over a 3-year period, the study followed 600 children between the ages of 2 and 7, monitoring the influence of dog ownership – or loss – on their physical activity levels. Utilizing accelerometers and parent report surveys, researchers measured children's time spent sedentary, on screens, and being physically active.

The effects of dog ownership

Overall, findings from the study show dog ownership can have a positive influence on children's physical activity and that we start to see those benefits from early childhood.

An increase in daily physical activity was observed in children whose families acquired a dog over the study

period, while those whose families experienced the loss of a dog recorded a drop-off in physical activity.

The results were more pronounced among girls.

On average, girls who acquired a dog increased their light-intensity activities and games by almost an hour a day. Conversely, girls who experienced the loss of a dog decreased their light-intensity activities and games by around the same amount of time.

The role of walking and playing

Both boys and girls who acquired a dog increased their unstructured physical activity – such as playing in the yard, going to the park and walking or playing with the dog – by around 7 occasions per week, compared to children without dogs. In contrast, children who lost a dog reduced their unstructured physical activity by 10 sessions per week for girls and almost 8 sessions per week for boys.

When walking and playing with the dog were excluded, there were no changes in unstructured physical activity. This suggests the changes were directly related to the addition of dog-facilitated physical activity.

New findings

Previous research has often focused on adults or examined the impact of dog ownership at a single point in time. What sets this research apart is its longitudinal



nature, offering insights into the causal effects of dog ownership on children's movement behaviors. This study showed it wasn't that more active children acquired a dog, but adding a dog to the household increased children's unstructured and light-intensity physical activity, especially among girls.

Insights into the effects of loss

The research also provides the first evidence on a previously overlooked aspect: the impact of losing a family dog on children's movement behaviors. Children in this study who lost a dog demonstrated a decline in unstructured physical activity, and, for girls, their light-intensity physical activity.

Losing a family pet is often children's first experience of death and can elicit a profound grief response that could reduce participation in normal activities. However, it can also provide children opportunity to learn about the life and death cycles of animals and the importance of caring for animals through the aging process.

Promoting active lifestyles

Regular physical activity from an early age is crucial for children's health and well-being. Dog ownership could play a role in promoting healthy movement behaviors and reducing the short- and long-term risks of many chronic diseases. Families who have a canine companion should be encouraged to leverage this opportunity to promote active lifestyles among children, as not all children who have a dog walk and play with it, causing them to miss out on a daily source of physical activity for them and the family dog.

However, it's essential to approach the findings of this research with nuance. While dog ownership can positively impact children's physical activity, it comes with responsibilities and is not appropriate for every family.

Taking a 'one health' approach – a multi-sectorial strategy aiming to improve the health of people, animals and the environment by recognizing the interconnections between them – both human and animal health professionals can encourage dog owners to increase their dog-facilitated physical activity in a safe and appropriate manner to support canine and human health. ◆

Innovative private label feed supplements & cosmetics for animals

- ◆ High quality tailor made formulas
- ◆ FCA, GMP+ and Cosmos certified
- ◆ Sustainably and safely produced
- ◆ Flexible service
- ◆ +200 satisfied customers

N° 1 in
Belgium



+32 (0)56 25 57 00

info@nutriliq.eu

www.nutriliq.eu



Suziria Brands UKRAINE

Decades of pet care excellence

What started as a family business sparked by a beloved cat has grown into one of Ukraine's top pet players, with an expanding global footprint.

The story of the Suziria Group began 30 years ago, when Serhii and Tetiana Potapova, inspired by their love for the family's cat Jean, started the company. That small business has since evolved into a leading manufacturer, retailer and distributor in Ukraine.

Today, Suziria operates over 10,000 sq m of production facilities and 16,000 sq m of warehouses, while managing more than 200 pet stores across the country.

Suziria Brands is the part of the group that develops and manufactures innovative brands and products that are sold internationally.

Popular brands on offer

The Suziria Brands product range includes food and snacks for dogs and cats, grain food and goods for birds and rodents, pet clothing, hygiene items and various accessories such as toys, pet beds and scratching furniture.

Among its flagship brands are food lines such as Savory, Half&Half and Priroda, each catering to different pet nutrition

needs. Non-food brands include SoftVET, focusing on pet health, and Buddy Boo fashion for pets.

Currently, the company partners with 15 customers across 9 countries. Its pet brands have already gained many loyal consumers in Poland, the Czech Republic, Slovakia and Romania, and Suziria now has plans to go even further afield.

Marketing in partnership

Recognizing the importance of strong partnerships, Suziria Brands offers marketing support to its distributors and retailers.

The company's team works closely with partners to develop effective go-to-market strategies and enhance brand communication, sharing its expertise to ensure mutual success in new markets.

Private label opportunities

A key part of the Suziria Brands portfolio is its private label options. The company provides a wide range of customized products across various

categories – from snacks for cats and dogs to grain food for birds and rodents, and non-food items like pet clothing, pet beds and cat scratchers.

The pet food on offer spans different forms, flavors and price segments. All produced in European HACCP-certified facilities, this includes products with specific features such as vitamin-mineral complexes that are soy-free, sugar-free and gluten-free.

Each product is the result of years of meticulous research and development.

Future expansion plans

As Suziria Brands continues to grow, it maintains its commitment to family-driven values and innovation.

The company's focus on brand development remains a vital part of its strategy, as it aims to introduce even more pet lovers around the globe to its quality products. ♦

Suziria Brands
export.suziria.ua



How is the US pet accessories market performing?

The pet owner's wallet faces continued pressure – something that is particularly noticeable in non-essential categories such as hard goods. Meanwhile, direct-to-consumer (DTC) brands are challenging traditional retail.



Claire Obertin
Market Research Associate
Cleveland Research Company

Based on its studies in the US pet category, Cleveland Research Company (CRC) currently anticipates that underlying market trends such as benign inflation, non-essential spending pressures and a slowdown in pet household formation are likely to persist through the first half of next year.

Hard goods having a tough time

One of the largest categories within pet retail – hard goods – is a key topic within research conducted by CRC. Results show that demand for hard goods and accessories has remained largely muted throughout the year. Category growth for 2024 is expected to be 0-1%, with a similar trajectory forecast for 2025.

In biannual CRC surveys, US shoppers are asked what pet supplies they have bought in the past 6 months. Findings from summer 2024 and spring 2023 indicate that these purchases are largely consistent. Toys remain the most purchased category. Interestingly, bowls and feeders plus grooming supplies are now showing growth compared with the previous 6 months.

Opportunities for cat innovations

Although there is no true source for pet adoption metrics, the research suggests a subdued pet household environment through 2025. As cat and dog hard goods are very much linked to adoption metrics, this influences categories like collars, leashes and beds.

There was some rebound seen in the summer 2024 survey among pet parents, compared with winter 2023 results, but with a softening in these [▶ SEE NEXT PAGE](#)

The total DTC pet market in the US is estimated at \$2 billion (€1.84B) as of 2024 and the market is believed to be growing.

categories compared with spring 2023. As cat adoptions are now outpacing dog adoptions in the US, there are opportunities for leading brands to explore differentiated feline offerings such as cat tree innovations and cat beds.

Quality comes out on top

Another trend observed in the broader pet market and identified in the hard goods category, is that consumers are increasingly seeking quality when making pet purchases. Consistent over the past 6 months, whenever pet consumers have been asked to rank product attributes in terms of importance for making a purchase, quality is at number 1. This applies to both dog and cat owners.

Quality is definitely a factor in the hard goods category, with both higher price point items and products with greater longevity doing well. The trend has been noted in traditional bricks-and-mortar purchases as well as pure-play e-commerce retail. It holds especially true for cat toys – again an opportunity presented by recent adoption trends – and is now seen as a green shoot in the overall pet hard goods category.

Threat of copycat products

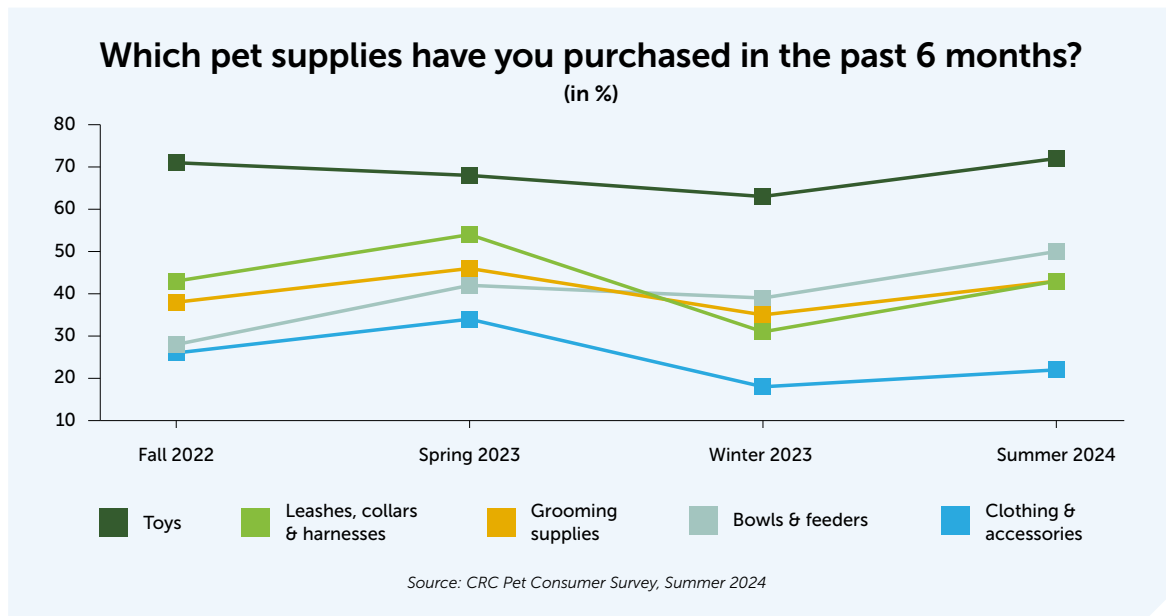
A headwind facing hard goods brands is the copycat nature of the business – particularly among pure-play e-tailers such as Amazon, Temu and even TikTok Shop. This was identified as a theme during the SUPERZOO trade show hosted in Las Vegas in August. Brands were talking about innovation in the space being stale, and cheaper, copycat products coming onto the market.

Brands are choosing to focus their retail partnerships at bricks-and-mortar outlets in order to mitigate some of the copycat risks. In an attempt to drive awareness of differentiation, a number of brands are starting to redefine the messaging on their packaging, so as to highlight attributes like sustainability, domestic production and durability.

DTC vs traditional retail

Another challenge for traditional hard goods brands and pet specialty retail as it functions today in the US, is the emergence of DTC brands. During the last quarter, there has been noticeable skepticism around DTC brands and the degree to which they are meaningful competitors to retailer brands.

CRC estimates the total DTC pet market in the US at \$2 billion (€1.84B) as of 2024 and the market is believed to be growing, due to overall retail channel shifts.





Consumers are increasingly seeking convenience in their pet category purchases.

This trend was highlighted in recent research, when respondents were asked to indicate the importance of convenience in their pet product purchasing and marked it as 4 on a scale of 1 to 5. It is a consumer need that the DTC market obviously addresses.

To prevent more market share leaking from retail to these DTC players and to drive differentiation and innovation in their stores, pet specialty retailers are looking to bring DTC brands into bricks-and-mortar outlets. This strategy has proven effective for DTC brands looking to scale up quickly, capitalizing on the brand awareness they've already built.

However, DTC brands who have a loyal shopper base have noted loss of brand ownership when moving into traditional retail, so they're now opting instead for pure-play e-tailer partnerships or a slower progression into physical stores. Overall, the emergence of DTC brands creates awareness for branded products too, while spurring innovation across all categories.

Vital market insights

As vendors and retailers across pet retail look to drive unit sales growth in 2025, it is vital that they understand underlying market dynamics, pet shopper behavior, the appetite for innovation and the investment levels needed to grow their market share across all channels. The hard goods category is expected to remain under pressure through the first half of next year, but there are still opportunities for retail and DTC to introduce innovative and margin-driving products. ♦

GOLDEN *Nature*

PURE NATURAL FIBRES



Biodegradable **Compostable**

**Super-fast
clump formation**



pet-earth

pet-earth GmbH

+49 (0) 5731 868310-0 info@pet-earth.de

www.pet-earth.de/en

Essential summer accessories for dogs

Discover the latest innovations in products that are designed to enhance the well-being of dogs during the warmer months.



Ivana Crnec
Contributor
PETS International

The global pet accessory market was estimated at \$21.8 billion (€20.1B) in 2023, is growing at a compound annual growth rate of 7.7% and is forecasted to reach \$42.2 billion (€48.9B) by 2032. It's a sector increasingly influenced by the number of owners willing to spend on their dogs' welfare. A wide range of summer-specific dog accessories, including SPF gear, water bottles and preventative parasiticides, are now available to keep pets safe in the heat.

SPF for dogs: sprays to fabrics

Protecting pets from the sun's harmful UV rays has only recently become a recognized concern. As the American Kennel Club notes, sunburn can lead to certain types of skin cancer and exacerbate autoimmune and skin conditions.

However, a 2022 survey of 2,000 dog owners showed that 46% did not know pets need sun protection, 55% were unaware of the effects of sunburn on dogs and 7 in 10 owners had no idea how to use dog sunscreen.

The scope of SPF gear for dogs is not limited to creams and sprays. Brands are now making protective pet garments using the same sunscreen fabric technology

used in human activewear. T-shirts in bright colors and stylish designs are the most popular SPF garments for dogs.

Hydration solutions for dogs

According to the British Veterinary Association, veterinarians see 5 times more cases of heatstroke in June, July and August. Hot weather and insufficient hydration contribute to this increase, making portable water bottles a vital accessory for active dogs.

With rising demand, the global dog water bottle industry is expected to be worth \$260 million (€239.6M) by 2033, according to Future Market Insights. Recent developments in this sector include leakproof lids, ergonomic grips, integrated food dispensers, temperature control, water level indicators and waste reduction technology.

California-based Spleash, the winner of a 2021 Pet Innovation Award, offers a water dispensing system that conveniently attaches to most dog leashes and holds 12 oz of water. Meanwhile, US pet supplies specialist Springer Pets has created a waste-controlling travel bottle with a built-in, foldable silicone drinking bowl.

The simple but efficient squeeze-and-release design allows excess water to drain back into the bottle, saving drinkable water.

For eco-conscious pet owners, Belgium's M-PETS produces dog water bottles made from recycled plastics, while New Zealand company Puprika uses BPA-free materials and UK-based Bonnie Woof's bottles feature environmentally friendly polycarbonate.

Keeping parasites at bay

The flea and tick preventatives market is driven by the spread of vector-borne diseases and awareness campaigns targeting pet owners. According to Grand View Research, it was valued at \$6.6 billion (€6.1B) in 2023 and is projected to reach \$7.1 billion (€6.5B) in 2024 and \$10.9 billion (€10.1) by 2030.

Spot-on products account for the largest revenue share. Pet pharmaceutical industry giants Zoetis, MSD Animal Health, Boehringer Ingelheim, Virbac and Elanco lead spot-on sales. However, a 2024 study published in Science of the Total Environment revealed that spot-on products contribute to aquatic pollution when washed into water systems.

To minimize environmental impact, brands are offering alternatives, such as collars and chewables. Last year, Certified B Corp Alzoo launched a collar made with natural ingredients such as cedarwood and peppermint oil, which repel fleas, ticks and mosquitoes.

At the same time, the US Food and Drug Administration (FDA) approved Boehringer Ingelheim's NexGard PLUS, a tasty beef-flavored chewable tablet that protects against external and internal parasites. The brand gained additional attention earlier this year when it donated more than 1.9 million NexGard PLUS doses worth \$42.6 million (€39.3M) to animal shelters.

MSD is behind the industry's latest breakthrough: developing an injectable version of Bravecto that provides up to a year of parasite protection and is safe for puppies over 6 months old. The injection is already available in Europe and has recently been approved by the Veterinary Medicines Directorate (VMD) for use in the UK. ♦

Cutey®

LOOKING FOR DISTRIBUTORS AND PRIVATE LABEL MANUFACTURERS

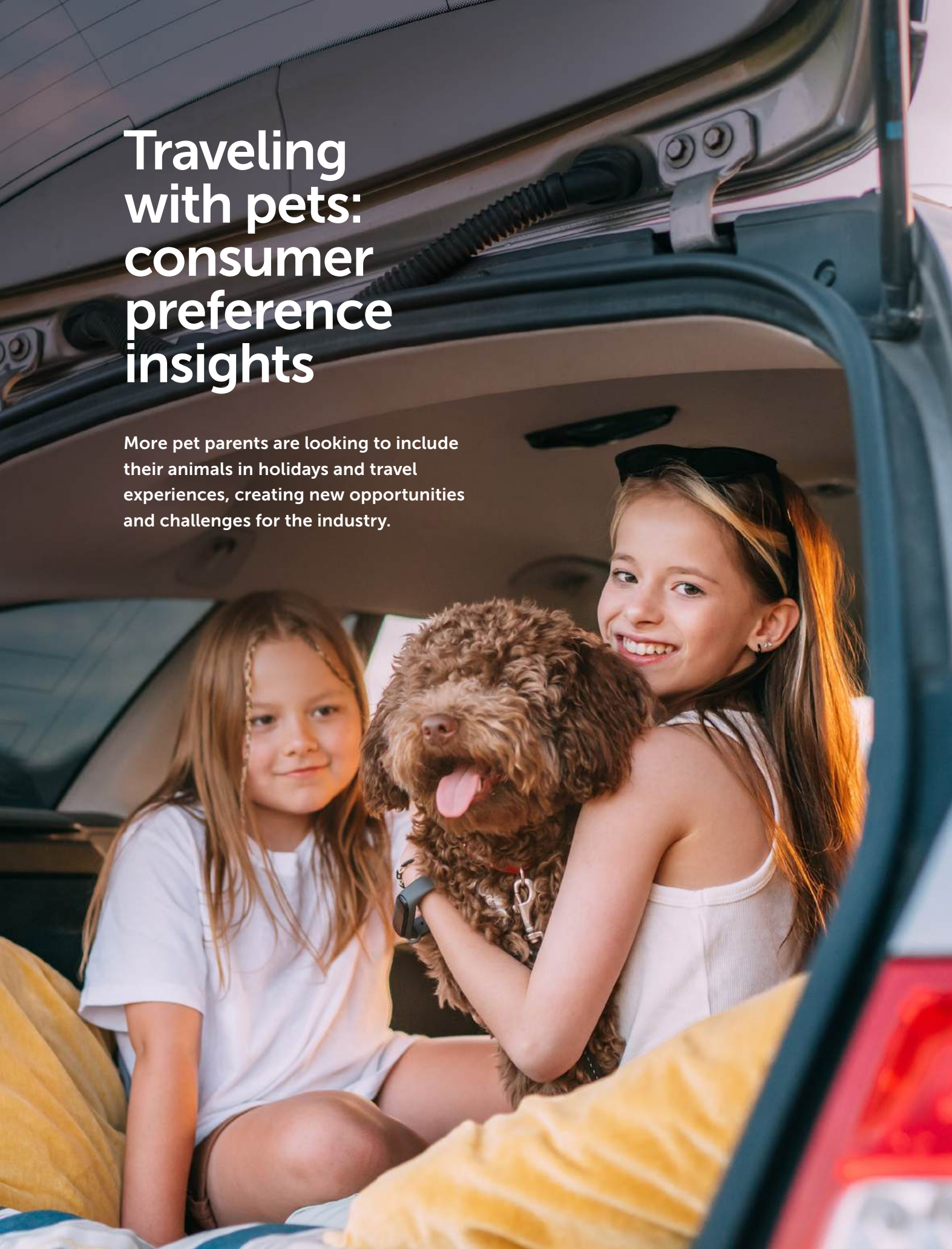


شركة تموين الشرق للتجارة
ORIENT PROVISION & TRADING CO.

Orient Provision & Trading Co. Po. Box 11035, Jeddah 21453, Kindom of Saudi Arabia.
Head Office Jeddah, Tel: +(966) 12 699 0999, Fax: +(966) 12 660 9201, Email: optc@optcl.net

Traveling with pets: consumer preference insights

More pet parents are looking to include their animals in holidays and travel experiences, creating new opportunities and challenges for the industry.





David Palacios Rubio
Editor-in-Chief
GlobalPETS



Joy Nelloolichalil
Contributor
PETS International

A recent survey by PETS International and Yummypets of more than 800 pet parents in the US, Canada, the UK and France highlights a growing trend: more pet owners are choosing to travel with their pets, and the sector is acting to keep pace with demand.

How widespread is traveling with pets?

As many as 72% of respondents travel with their furry friends each year. Most (40%) do so between 2 to 4 times a year, with Canadians doing so more than average (42%).

A little over 2 out of 10 pet parents take their pets on a trip once a year, with all countries showing similar trends.

This is the same number for those who take their pets traveling frequently, over 5 times a year, with 25% of American respondents doing so. On the other hand, this does not happen as often in Canada (15%) and France (19%).

Surprisingly, 42% of respondents who own birds said that their pets accompanied them on their travels more than 5 times per year. This contrasts with the trends shown by cat (20%) and dog (23%) parents.

On the other hand, 19% of pet parents say they never travel with their pets. This is especially notable among cat owners, with 24% admitting their felines don't leave home.

Means of transport

More than 6 out of 10 respondents prefer organizing road trips with their pets, followed by camping and hotel stays (30% and 13%, respectively). Only 3% of respondents have taken their animals on a cruise.

Cars are the most popular way of transporting pets, with 94% of respondents across the 4 countries choosing this mode of transport. Trains (21%), planes (17%) and buses (12%) follow.

Air travel is gaining traction, with 25% of American and Canadian pet parents opting to travel with their pets via plane. However, this mode of transport is less popular in Europe, with only 5% of British pet parents and 14% of French opting to travel with their pets this way.

Airlines tap into demand

With an increasing trend toward transporting pets via plane, airlines are responding with innovative solutions. Korean national carrier Korean Air launched a loyalty program allowing pet owners to earn stamps for pet flights. Air Canada is partnering with a telemedicine firm to offer in-flight telehealth services for pets traveling in cargo.

In Spain, a low-cost airline introduced buy-on-board pet treats last year after partnering with the Edgard & Cooper pet food brand.

[▶ SEE NEXT PAGE](#)

Preferred mode of transport when traveling with pets



Source: Yummypets-PETS International, September (n= 827) in US, Canada, UK and France

wanpy®

- Made with real meat
- High protein low fat
- Healthy training reward



Safe, Delicious & Healthy Dog Treats

Pets are our friends and part of our family



Head Office: Yantai China Pet Foods Co., Ltd. STOCK CODE: 002891 Angie@wanpy.com.cn www.wanpy.com.cn

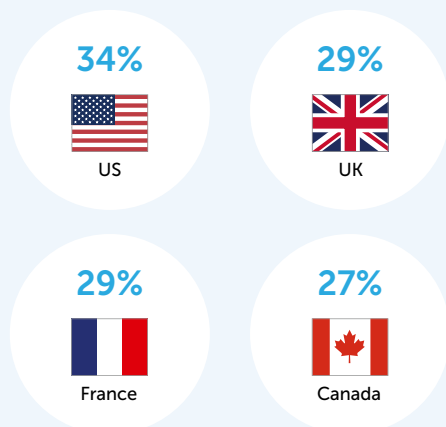
Wanpy Europe Petfoods bv

Mr. Martien van Bohemen

Mbl.: +31 (0) 6 23375988

martien@wanpy.eu

"I will travel more with my pet in the future"*



Source: Yummypets-PETS International, September (n= 827) in US, Canada, UK and France
*Percentage of respondents agreeing with the statement.

American dog brand BARK, meanwhile, launched the world's first air travel experience for dogs in May 2024. The company aims to solve current pet air travel challenges, such as placing dogs in airline-specific carriers, confining them to duffel bags and stressing them out when flying in cargo.

Meeting the challenges

The PETS International and Yummypets survey concludes that the top concern for pet parents when traveling with their pets is the animal's comfort and well-being (60%). French parents seem to be the most worried about this, with 66% of respondents highlighting it.

Pet safety (50%) and finding pet-friendly accommodation (46%) follow. Nearly 7 out of 10 dog owners in all 4 countries consider pet-friendly accommodation one of their biggest travel concerns, 11% more than cat owners.

Better accommodation

More than half of American pet parents agree that finding pet-friendly accommodation is among their biggest concerns. Indeed, the survey found that staying in pet-friendly accommodation when traveling is extremely important for 89% of respondents.

Picking up on this concern, earlier this year Mars announced a partnership with the world's largest travel platform Tripadvisor to enhance travel experiences for pet parents with a Pet Travel Hub designed to support owners and the businesses looking to accommodate them.

When booking accommodation, 62% of pet parents check for pet-friendly areas, such as parks or walking trails. This is important to 74% of pet parents in the US, but only for 53% in neighboring Canada.

39% of respondents valued pet-friendly events and activities, while dining options (36%) and pet bedding (36%) were also popular. Pet-sitting services (29%) and grooming (19%) were lower on the list but still notable.

Satisfaction levels

Only 28% of respondents admitted to being very satisfied with their experiences traveling with their pets, while 54% expressed satisfaction. On average, American and French pet parents seem very satisfied (34% and 27% respectively).

This trend held steady across types of pet – 53% for dog owners and 54% for cat owners – as well as across regions.

Only 3% were dissatisfied, indicating that most pet owners have positive experiences when traveling with their companions. This also correlates with the desire for more frequent travel, with 30% of respondents planning to travel more with their pets in the future and 57% planning to maintain the same frequency. ♦



The online flea and tick market: when is best to strike?

Data confirms that Amazon is the go-to platform for this specific pet care segment, but competitors in some countries are still managing to mount a challenge.



Paula Flores
Contributor
PETS International

In a category characterized by seasonality, understanding website search and traffic trends is critical for pet care brands. PETS International analyzes digital engagement across 4 markets, revealing key insights that can help brands capitalize on the monthly trends.

Pet specialists vs big tech

Data for the flea and tick segment provided by data aggregation company Similarweb reveals a number of interesting trends in online consumer behavior in the US, UK, Germany and France. Based on website traffic, clear market leaders emerge in each country.

Across all the markets – unsurprisingly – the figures show Amazon’s strong influence, primarily due to its wide product range, aggressive pricing and brand trust. Pet specialists like Pets at Home (UK), Zooplus (France and Germany) and Fressnapf (Germany), doubtless offer a more specialized shopping experience, but attract less traffic volume online.

US

Amazon leads the pack

With 24 million visits in September 2024, Amazon clearly leads traffic volume in the flea and tick category, followed by Chewy with just over 1 million. Amazon consistently attracts unique visitors, ranging between 14.4 and 20.7 million from 2021 to 2024 – greatly surpassing the other sites. Amazon’s engagement is also high, with 3.44 pages per visit in the flea and tick segment as of September 2024.

The figures according to the Similarweb insights do, however, show fluctuations. For example, Amazon recorded the lowest number of unique visitors in the flea and tick category in February 2024 (14.4 million). Yet, this is still higher than those of the other sites.

Visitor activity elsewhere

Chewy experienced 1.2 million visits in September 2024 (although its peak is 1.4 million visits, in July 2024) and over 3 million page views. With decent traffic and engagement (2.53 pages per visit in September 2024), Chewy stands out for its sustained growth. PetSmart has just under 1 million page views (955,038) and Petco slightly fewer at 827,392 as of September 2024.

In 2024, PetSmart saw the most fluctuations, with unique visitors ranging from 188,948 in February to 338,874 in July. Despite getting fewer visits than Petco and Chewy, PetSmart makes up for it with stronger user engagement, as its 3.05 pages per visit in September 2024 demonstrate.

Petco has shown minor fluctuations across the months of the year, with unique visitors ranging from 308,785 to 381,012 in 2024. The lack of significant spikes or dips indicates a stable audience base, although it registers lower engagement than the other sites.

UK Most visits to Amazon

From September 2021 to September 2024, amazon.co.uk received 151.7 million visits, making it the dominant platform for flea and tick product sales. Its closest competitor, Pets at Home, saw 8.6 million visits in the same period, followed by smaller pet medication players such as VioVet and Pet Drugs Online.

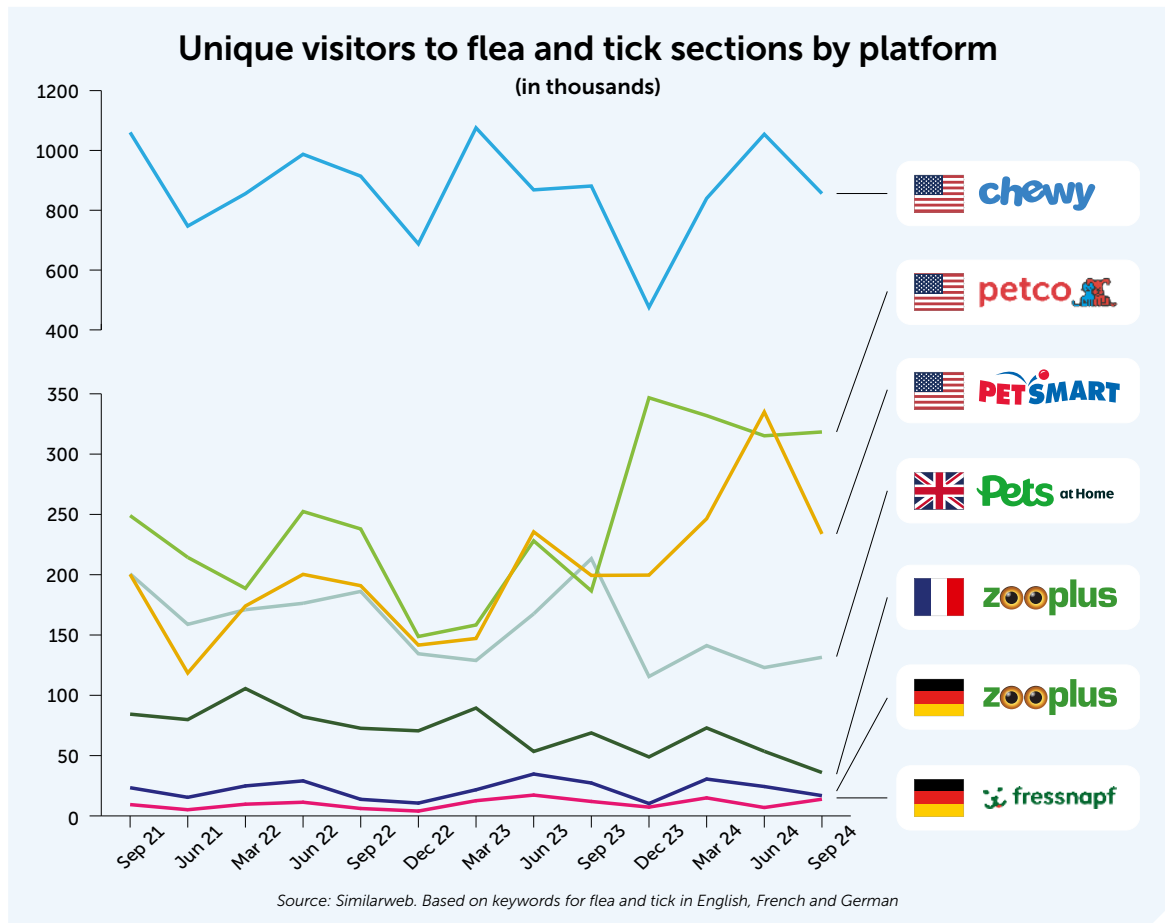
Amazon attracts a much higher number of unique visitors each month (an average of around 2.4 million over 2021-2024, with a maximum of 3.8 million in January 2021), while Pets at Home shows a fluctuating pattern – unique visitors ranged between 95,066 and 233,589 in the period 2021-2024. Both sites experience the seasonal effects of flea and tick products, with a dip in unique visitors in February.

Engaged Pets at Home users

Amazon's pages per visit across the 2021-2024 period (3.3 on average) remain relatively stable, suggesting that users engage with multiple pages each time. Interestingly, despite Pets at Home's fewer visits and unique visitors, engagement in the flea and tick section appears to be around 2.87 pages per visit.

This suggests that its user base is highly engaged, and its niche and specialized content encourages users to spend more time browsing multiple pages.

[▶ SEE NEXT PAGE](#)



TARGET and NEUTRALISE parasites !

FAST AND RADICAL ACTION

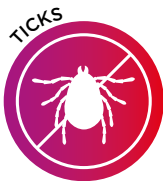


ECTO CHOC PARASITES

The new **ECTO CHOC** range of pest control products acts on parasites present on the **ANIMAL + ENVIRONMENT**.

Without rinsing, the new ECTO CHOC PARASITES range **QUICKLY THWARTS** infestation by external parasites on the animal and in its environment. It surrounds the parasite with a liquid film, blocking it and making it inactive or stopping it moving through the environment.

Its purely **MECHANICAL ACTION** and **PLANT-BASED INGREDIENTS** mean it can be used early on, on the animal and in its environment, leaving a fresh scent after use.



Efficacy tested against fleas and ticks on a panel of 30 dogs.

QUICKLY NEUTRALISES PARASITES



*3 references: for dogs/cats, environment and poultry.



Discover our videos
ECTO CHOC



Germany

Amazon strong in 2024

With high traffic to its site (the highest, in July 2024, was 216,220 visits) and strong engagement (2.86 pages per visit), Amazon also leads the flea and tick segment in Germany. Users are highly engaged, viewing nearly 3 pages per visit and generating nearly half a million page views, making it ideal for large-scale campaigns.

Looking at the whole period running from September 2021 to September 2024, Amazon drew the highest number of unique visitors in 2024, with numbers ranging from 32,520 in January to 129,074 in July, according to the Similarweb data.

Home-grown platforms

Over the 4-year period, visits to Zooplus range between 15,156 and 68,528. Growth is achieved in the early months, typically peaking in July. The stabilization that follows shows the platform's dynamism and growth potential. Zooplus shows good user engagement, right behind Amazon, with an average 2.72 pages per visit.

Fressnapf has the smallest number of unique visitors, with 3,519 in January 2024 and 13,856 in September 2024. It sees consistent growth across the different months, albeit at a slower pace than Zooplus and Amazon. For brands catering to a more specific and niche audience, Fressnapf offers a smaller but engaged user base.

France

Amazon way out in front

Amazon dominates the online flea and tick market in France, with as many as 60.15 million visits between September 2021 and September 2024. Here again, Zooplus is trailing far behind, attracting 4.22 million visits over the same period.

Seasonal fluctuations

Zooplus saw a peak in March 2022 at 105,583 visitors, but experienced a significant drop in September 2024, hitting a low of 35,975. Amazon, however, maintained a larger visitor base with more consistent traffic, peaking at 1.45 million visitors in July 2024. Seasonality and external market conditions likely influenced these trends. ◆



Amazon US sales data

Value sales data for flea and tick products on Amazon in the US accounted for \$31.3 million (€28.9M) for dogs, and \$19.4 million (€17.9M) for cats in August 2024. This market segment also experienced notable shifts – for both dog and cat items – in seasonal fluctuations and overall growth.

Analyzing monthly sales data from Similarweb for September 2022 to September 2024 reveals key trends and an overview of how the market for products like these has recently evolved on Amazon. Flea and tick product sales show a clear seasonality pattern, with significant peaks during the warmer months of spring and summer. Sales consistently rise between March and August, corresponding to the period when flea and tick activity is at its highest.

Patterns in cat and dog products

In 2023, sales of flea and tick products for dogs surged from \$11.8 million (€10.9M) in January to \$42 million (€38.8M) in May, reflecting strong demand that continued through June and July. A similar pattern was seen in 2024 where, in March, dog product sales rose considerably from \$16.9 million (€15.6M) in February to \$33.8 million (€31.2M), going on to reach a new high in May – \$41.9 million (€38.7M).

As well as these seasonal peaks in sales, there are also notable dips. This is particularly in colder months such as December and January, when sales were at their lowest – \$13.2 million (€12.2M) and \$11 million (€10.2M) respectively.

The cat flea and tick market also fluctuates but, all in all, good sales performance has been reported. In fact, between February and July 2024 sales almost trebled, going from \$9.2 million (€8.5M) to a peak of \$24 million (€22.2M) in July, showing the strong seasonal demand.

Pet wellness: new solutions for anxiety, low mood and pain

As owners increasingly prioritize their pets' well-being, the market for products addressing common health challenges continues to expand.



Ivana Crnec
Contributor
PETS International

Anxiety, poor mood and chronic pain are common issues for pets, often impacting their quality of life. To meet these challenges, innovative products, including cannabinoids (CBDs), and advanced and modern pain management options, are gaining traction.

Focusing on health

A survey of over 2,000 pet owners published in The Canadian Veterinary Journal found that 43.6% prioritized purchasing healthy food for their pets over their own well-being. With such devoted pet parents, it's no surprise that demand for products that support mental and physical health has surged.

In the US, the pet CBD business is booming. According to Grand View Research, the pet CBD market has grown from almost zero in 2016 to \$248.4 million (€228.8M) in 2023, with projections it will reach \$1.7 billion (€1.6B) in the next 6 years.

Dogs are the leading CBD consumers, with reports that 65% of pet CBD revenue in 2023 was for dogs, primarily purchased by millennials, who make up more than half (53%) of CBD sales.

Cannabinoids lead the way

A survey by PETS International indicates that 65% of pet owners have used CBD for their dogs, citing pain and anxiety as the top reasons, with joint issues being a common cause of pain. Anxiety can stem from

multiple factors, including being left alone, loud noises or car journeys.

Despite CBD's global popularity, local regulatory frameworks shape market dynamics. In 2023, North America held 40.2% of the pet CBD market. While Canada and Europe have stricter regulations, promising growth prospects are seen in the Asia Pacific region. Australian veterinarians are legally allowed to prescribe CBD products, whereas cannabis remains banned in Arab and Middle Eastern countries.

The market's dynamics also reflect pet owners' increasing demand for top-tier CBD products. "Feedback from our customers shows that pet owners increasingly seek transparency and higher quality standards in hemp-derived products," says Erik Rivera, CEO and founder of Honest Paws, which makes CBD oils for dogs.

Innovative pet tech for wellness

Historically, the anxiety-relieving and mood-boosting product market was limited to a few options, such as pheromone diffusers, thundershirts, weighted blankets and calming beds. However, today, technology has inspired the emergence of novel pet product categories, like pet tech commerce, valued at \$10.5 billion (€9.7B).

Expensive, high-end gadgets are becoming mainstream, making their way into the baskets of tech-savvy pet owners keen to support their pets' well-being. For instance, Seattle-based Furbo offers a pet camera with a rotating 360° view and HD resolution, featuring

2-way audio and barking alerts, allowing owners to monitor and interact with anxious pets remotely.

Similarly, Austrian company Tractive has developed an intelligent dog GPS tracker that clips easily onto collars and combines location tracking with wellness monitoring. PetPace's Smart Collar, designed with veterinary input, tracks vital signs, activity levels and overall health.

SureFlap provides additional security with its radio-frequency identification (RFID) enabled pet door, ensuring only pets with recognized ID chips can use it. Through the app, owners can create custom settings for individual pets. For anxiety relief, Pet Tunes offers a Bluetooth-compatible music player preloaded with calming music, while Paw Wave makes massagers for dogs.

Finally, interactive toys like PupPod, iFetch and PetGeek keep dogs mentally stimulated and physically active, helping maintain a balanced mood.

Next-generation painkillers for dogs

The veterinary pain management market is on an upward trajectory, and arthritis is the top issue. According to the UK's Canine Arthritis Management, arthritis potentially affects 35% of all dogs and 80% of dogs over 8. Mordor Intelligence reports the market's value will reach \$1.7 billion (€1.5B) in 2024.

At the end of 2022, UK pharmaceutical company Norbrook patented Firox, a chewable dog tablet containing anti-inflammatory drug firocoxib. Earlier that year, the US Food and Drug Administration (FDA) approved medetomidine and vatinoxan for pain control in dogs. In May 2023, Librela – launched by Zoetis in 2021 after the European Medicines Agency granted marketing authorization – became the first monoclonal antibody approved by the FDA for osteoarthritic dogs. Zoetis also offers Solensia for cats with the same issue.

With the market seeing expanding options for pet pain medications, competition is increasing – driving prices down and making meds more affordable. ♦

GRANITOL



**100% RECYCLABLE PACKAGING
FOR YOUR PET FOOD**

Get the cliché for FREE

Visit us at GlobalPETS Forum in Prague!

22. - 24. January 2025

or

Go to our web

www.granitol.cz/en/gpf25



**WE PROTECT
NATURE!**

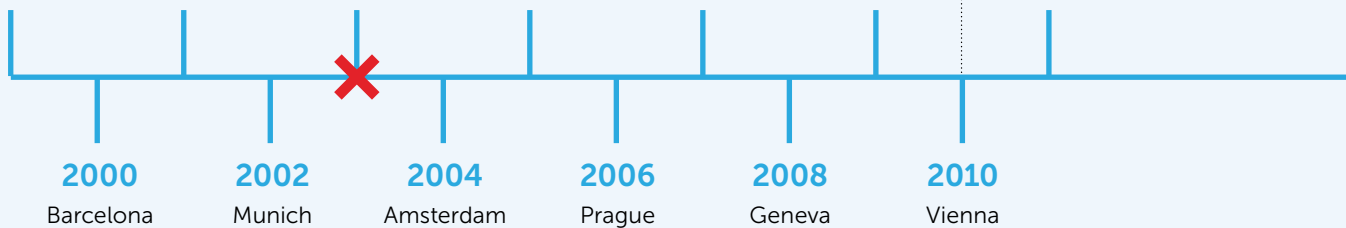


25 years of GlobalPETS Forum

January 2025 will mark the 25th edition of our yearly event.
Let's look back to the previous editions.



1999 Amsterdam
2001 Florence
2003 No GPF
2005 Brussels
2007 Copenhagen
2009 Amsterdam
2011 Barcelona



New GPF
Chairman:
Nic
Dechamps

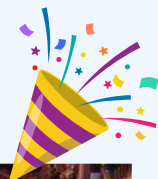


First GPF
Award winner:
Pets
At Home



Most frequent attendees

- 🏆 Dušan Plaček - 23 times
- 🏆 Paul van der Raad - 22 times
- 🏆 Richard Pistori - 22 times



First
GPF Asia in
Shanghai



Corine van
Winden
steps down
as CEO

2013
Prague

2015
Madrid

2017
Warsaw

2019
Amsterdam
Beach

2021
No GPF

2023
Berlin

2025
Prague

2012
Berlin

2014
Amsterdam

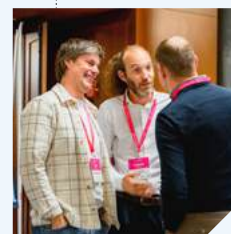
2016
Nice

2018
Venice

2020
Athens

2022
Amsterdam
Beach

2024
Venice



Retail tour
in Nice





Everything you need to know about the pet industry's leading networking event

Discover why 300 executives from leading pet companies are joining us at the GlobalPETS Forum in Prague and why you might want to come too.

Since 1999, the GlobalPETS Forum has been a popular meeting place for the industry. It's an opportunity to reconnect with old friends or acquaintances and make new business connections. It's also a chance to learn more about where the industry is going, which consumer trends to keep an eye on and how to prepare your company for continued success in the future.

The program

The upcoming edition of the GlobalPETS Forum spans 3 days, from 22 to 24 January 2025, and will be held at the 5-star Marriott Hotel in Prague in the Czech Republic.

Day 1: The event kicks off with an optional tour of pet retail stores around Prague. Afterwards, an informal evening dinner gives you the opportunity to socialize with other attendees.

Day 2: From the morning until the evening, the program is jam-packed with high-quality presentations and networking moments. At the end of the day, it's time to relax and network in a more informal setting as you enjoy a delicious 'walking dinner' during the renowned social evening.

Day 3: On the last morning, you'll get your final dose of inspiration from top speakers, followed by a networking lunch before heading home.

Who you'll meet

The attendees are a diverse group of senior-level executives (C-suite or VPs/directors) from a cross-section of the worldwide pet industry. For example, you might

bump into one of the major European pet retailers while grabbing an extra helping of delicious pasta at the buffet. Alternatively, you could find yourself sitting next to the CEO of a pet food company, a distributor from the Middle East, a branded pet toy manufacturer from the US or an international packaging supplier.

With a high repeat-visit rate, the GlobalPETS Forum has proven to be a can't-miss event. This is largely due to the quality of the interactions and the diversity of its attendees. Every year, we're proud to hand out 'loyalty awards' to people who've attended for 10, 15 or 20 years.

What you'll learn

What is currently happening in the industry? And, more importantly, where are things heading? By diving into the data and looking at changing consumer behavior, the experts will paint a picture of the industry's present and future for you.

You'll discover how you can take advantage of the latest developments, and where the biggest opportunities lie in the industry – from new potential in the cat market to the secrets behind building a successful pet brand. Hear how some of the Europe's leading brands are approaching the market and the changes they see coming... and much, much more.

For full program details and to register, go to the event website: globalpetindustry.com/gpf

Speakers

We've put together an impressive line-up of top speakers, including:



Dušan Plaček, CEO of **Plaček Group**, will share how he has built up the largest pet retail company in Eastern Europe and his plans for the future.



How is the largest pet retailer in the Nordics, **Musti Group**, performing? Hear all about it from Chief Customer Officer **Ellinor Persdotter Nilsson**.



Which pet products sell and how can you make them successful? Pet retail expert **Claire Gavin** will share the recipe she crafted during her time at Pets at Home and her consulting work.



Curious about the Asian pet market? **Dr. Matthias Koch**, founder of distribution company **Anibene**, will share his insights into this interesting and growing market.



Based on the latest industry data, **Mike Davies** from **NielsenIQ** will provide a picture of how the pet industry is doing and where the opportunities lie.



With a broad look at how society is evolving, trendwatcher **Tom Palmaerts** will explain how consumer attitudes are changing and how you can best prepare.

Sponsors



For 30 years, **VAFO Group** has been a leading premium pet food producer. Its portfolio includes dry and wet foods, snacks and supplements, and is available in 90+ countries.



M-PETS is a leader in innovative pet products for dogs and cats with over 350 patents. They combine stylish design, engaging functionality, and certified eco-friendly materials.



Kormotech is a family-owned company with Ukrainian roots that has been producing high-quality cat and dog food since 2003 – with production facilities in Ukraine and the EU.



IPV PACK specializes in producing innovative and tailor-made packaging. State-of-the-art materials, eye-catching designs and customized solutions to make your product stand out.

GlobalPETS Forum Award 2025

Who will follow in the footsteps of Tractive – 2024’s winner – as the proud recipient of next year’s prestigious GlobalPETS Forum Award?



The GlobalPETS Forum (GPF) Award is presented annually to the company that has taken the pet industry by storm with its exceptional performance, innovative developments and marketing prowess.

Over the past 25 years, the GPF Award has become one of the most important accolades in the industry.

Here are the finalists who are in the running for the GPF Award 2025:

PetSafe

PetSafe Brands™ is a global supplier of premium cat and dog accessories. Through nearly 35 years of growth, this family of brands has delivered innovation after innovation. By helping to keep pets happy, healthy and safe, the company wants to unleash freedom upon pet parents across the world.

QCHEFS

Founded in 2017 and with in-house production, QCHEFS specializes in natural dental care solutions for cats and dogs. Its innovative ‘made in Germany’ products combine dental health and nutrition. QCHEFS products are available in 25+ countries across Europe, Asia, North and South America, and the company continues to expand its global presence.

Love Pet Alliance

Love Pet Alliance is a Portuguese company that exports to 25 countries. With a focus on innovation, it has developed award-winning products based on quality. Love Pet Alliance has been ranked as one the most innovative companies in Portugal.

Earth Rated

Founded in 2009, Earth Rated® creates thoughtfully designed products for people who love dogs. As a B Corp-certified company, Earth Rated focuses on innovation and responsibility, making everyday moments simpler and better for people and their pups. From poop bags to grooming products, it serves over 4.5 million daily users across 25,000+ stores worldwide.

Just Russel

Just Russel is a Belgian pet care start-up focused on pet well-being through personalized nutrition and digital preventative health services. Combining science and technology, Just Russel’s proprietary algorithm tailors pet care based on 10 questions. The company’s vision is to become a global direct-to-consumer (DTC) pet care leader online.

Join us in Prague to find out which of these companies will win the GPF Award. ♦



Why it's time to pay attention to cats

Insights from a US survey show that pet food manufacturers can seize new market opportunities by meeting cat owners' rising demands, especially in relation to product choice, quality and healthfulness.



Shannon Landry
Pet Brand Manager
Packaged Facts

Given the recent decline in the US dog population, it's no surprise that marketers are turning their attention to the pet industry's other main segment: cats. According to a 2024 survey by market research company Packaged Facts, 43% of cat owners believe that they are treated like second-class citizens by pet food manufacturers and would like to see the same product selection and quality as dog owners. So, what are cat owners looking for, specifically?

What influences cat food purchases?

The survey shows that their pet's preference is the greatest influence on cat food purchases made by American cat owners. When asked about the strongest influences on their most recent cat food purchase, the majority of cat food buyers select: 'My pet likes it/will eat it'.

Trust in a specific brand is also an important factor, while price rounds out the top 3. Although many cat owners trust their veterinarian for information about cat food, fewer rank vets among the top influences on their actual purchases.

Looking for deals

Unsurprisingly, given the economic environment of the past several years, cat owners are on the lookout for deals. In some cases, owners have been trading down to lower-cost products, including private labels. When asked in the survey about significant challenges to pet ownership, approximately 40% of cat owners selected the high price of pet food, making it the top-ranking answer.

This corresponds with Packaged Facts' survey results from September–October 2023, which showed that nearly a third of cat owners had switched pet foods in the previous 12 months. Among those who had switched, 19% had traded down to a lower-priced national brand of cat food and an additional 9% had traded down to a lower-priced private label product.

Strong growth in private label

As inflation and an unsteady economy continue to put long-term pricing pressure on all pet categories, private label products are well positioned to leverage their status as affordable options. According to the latest report from the Private Label Manufacturers Association (PLMA) for the 52 weeks ending on 19 August this year, overall store brand volume in the pet care department was \$5.3 billion (€4.9B),

▶ SEE NEXT PAGE

representing an increase of 3.8%. Meanwhile, store brand unit sales were up by 4.5%. However, cat food was a standout performer, rising by 10.1%.

All these figures indicate that the typically very high level of brand loyalty in the cat food market may be weakening to some degree. Nevertheless, it is important to note that while cat owners may be interested in lower prices, they are not willing to sacrifice quality. Instead, they want products that promise value for money.

Preferred types of cat food

Despite cost concerns, the shift towards alternative forms of super-premium cat food is well underway, with fresh (refrigerated and/or frozen) and freeze-dried (or air-dried) pet food leading the charge. The figures for dry food/kibble are similar across both pet segments, with around 90% of cat owners and dog owners using it, but cat owners are significantly more likely to use wet foods (64% compared with 42% among dog owners). In fact, wet food usage among cat owners has risen by 3 percentage points since Packaged Facts' 2022 survey, with dry food usage holding steady.

While traditional kibble and wet foods continue to dominate pet food sales by a wide margin, the September-October 2023 survey showed that a

growing number of cat owners report purchasing cat food in alternative forms, including fresh/refrigerated (14%) and fresh/frozen (10%).

Interest in health and wellness

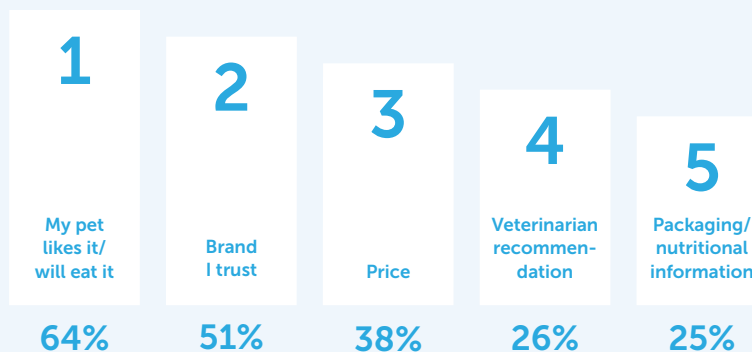
One trend running through all types of cat food is customized diets, which are favored by 10% of owners. This interest in alternative food formats is spurred by an overarching interest in pet health and wellness. The survey results also show that 68% of cat owners are worried about the healthfulness of highly processed pet foods.

Despite the apparent rise in interest among cat owners in fresh (typically described as 'gently cooked') food for their pets, the uptake hasn't yet reached the same level as for fresh dog food. This is likely due to major players such as Freshpet, The Farmer's Dog and Nom Nom remaining distinctly dog oriented.

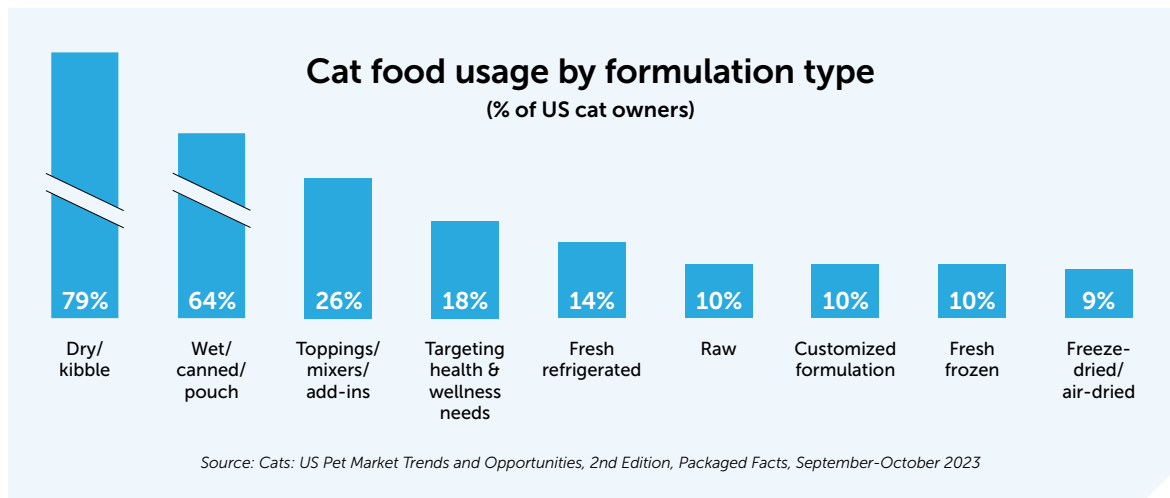
For example, Freshpet's cat-focused offerings are minimal compared to its dog-focused products. A search of its website in mid-2024 brought up just 7 products for cats compared to 55 for dogs. Perhaps even more tellingly, the company's presentation of earnings for Q1 2024 does not contain a single image of a cat – only dogs and dog food. In fact, there is no mention of cats at all.



Top 5 influences on most recent cat food purchase* (% of cat food purchases in the US)



Source: Cats: US Pet Market Trends and Opportunities, 2nd Edition, Packaged Facts, September-October 2023
* Multiple responses allowed



Key takeaways

Pet food marketers have traditionally relegated cats to secondary status in the US. This can partly be explained by the relatively small size of the country's cat population, and the fact that cats are also physically smaller and therefore need less food than dogs. However, due to a drop in dog ownership levels, it's time for pet food marketers who are interested

in maintaining sales volume to start paying greater attention to cats. After all, cat owners love their pets just as much as dog owners do and are just as willing to spend money on them.

A wider choice of high-quality and healthful foods that also offer value for money is exactly what the cat food market needs right now. ♦

The networking event of the year

What others say about the GlobalPETS Forum:



fressnapf
maxi zoo

"The GlobalPETS Forum is the TOP industry event. It is the best place for qualified discussions with the absolute leaders in our pet world – simply a must-have."

- Torsten Toeller, Fressnapf



AllerPetfood

"The networking is more intense and effective than when we have tight schedules during trade shows and the like."

- Henriette Bylling, Aller Petfood

More info? globalpetindustry.com/GPF



Expired US pet ingredient review creates uncertainty – and opportunity

As AAFCO and the FDA end their collaboration, industry professionals hope that new ways for feed ingredients to be assessed could work to the advantage of pet food companies.



Emma Penrod
Contributor
PETS International

The US has recognized for the past 17 years a list of ingredient definitions maintained by the Association of American Feed Control Officials (AAFCO) as a means of determining what may be included in commercial pet food products sold nationwide.

End of understanding

Under the terms of this agreement, the US Food and Drug Administration (FDA) provided AAFCO with the scientific expertise to review the safety and efficacy of new ingredients, and AAFCO's membership would vote to decide which ingredients ultimately passed muster.

That Memorandum of Understanding (MOU) formally ended on 1 October 2024 and the FDA has implemented an interim food ingredient consultation process that will continue to recognize existing AAFCO-approved ingredient definitions in the meantime. But the agency's long-term plans remain unsettled pending a broader public review of its animal food rules.

Possible new pathways

In the meantime, AAFCO has issued its own proposal with the scientific support of Kansas State University (KSU) that may or may not be recognized by the FDA,

but could nonetheless hold legal sway. So, the US could end up with 2 new, legally binding pathways for ingredient review within the next 6-9 months.

AAFCO's Executive Director Austin Therrell believes the new process could cut the length of new ingredient reviews in half. But unlike the FDA process, it will require AAFCO to charge applicants a service fee.

If approved by the general membership in January 2025, AAFCO could have the new process up and running by the second quarter of the year.

Comprehensive review

The FDA, meanwhile, has initiated a comprehensive review of its remaining ingredient approval pathways, the animal food additive petition process and the Generally Recognized as Safe (GRAS) process. An FDA official admits to PETS International that it is still too early to speculate on possible outcomes of the agency's broader animal food rules review, so it remains unclear what the regulatory landscape might look like in the long term.

AAFCO is hopeful that the federal agency will recognize ingredient definitions created under its own revised process, given that the association intends to abide by the criteria required for ingredients to be GRAS approved.



With the federal agency's recent announcement that it will not take action against ingredients listed in the 2024 AAFCO Official Publication, the FDA seems to have kept that door open.

Even if the FDA decides not to recognize the AAFCO process, the feed industry believes that determinations by AAFCO may still be legally binding. That's because state governments also have authority to regulate sales of animal food, and all 50 US states continue to recognize AAFCO's ingredient definitions.

Industry reactions

The American Feed Industry Association (AFIA) has also called on the agency to adopt AAFCO's newer definitions, including those that were already under review when the MOU expired, on an annual basis.

Although it's created some confusion for the time being, AFIA's Vice President of Public Policy and Education Leah Wilkinson says she's hopeful all this could work in the pet food industry's favor in the long run.

This could be true even if AAFCO and the FDA end up going their own ways and running 2 separate approval processes, because it could allow pet food companies to choose the pathway that is best suited to their new ingredient, Wilkinson says.

"If the review processes are done correctly, and they can help bring products to market in a timely, predictable manner, I think it will be good for the animal food industry," she says. "We're behind the rest of the world right now in our ingredient reviews and we know it, so we need to do things differently. And this is a good opportunity for that to happen."

AFIA's member companies have already adopted a varied approach to the interim review processes, Wilkinson points out, with some choosing to pivot to the GRAS or feed additive applications, and others opting to wait for a new process to be set up. ♦

The US could end up with 2 new, legally binding pathways for ingredient review within the next 6-9 months.

Only the best for our loved ones.



Real brewers' yeast – really effective.

Leiber YeaFi®

| brewers' yeast products

CeFi® pro

| best values in bioavailability

Biolex® MB40

| prebiotic. gut health. MOS

Leiber® Beta-S

| pure beta-glucans for strong immune defence

Leiber NuTaste®

| Natural. Pure. Delicious.

For further information just get in touch with us!

Visit our website:
leibergmbh.de



 **Leiber** 70 Years
Excellence in Yeast

Leiber GmbH | Franz-Leiber-Str. 1 | 49565 Bramsche
Germany | info@leibergmbh.de



WE GIVE FORM TO YOUR PACKAGING WITH OUR EXPERIENCE, QUALITY AND SERVICE.

Put yourself in the hands of an expert capable of **adding value to your product** with a skilful combination of advanced know-how and cutting-edge technologies.

You can count on us for packaging guaranteed by our experience, giving you a sense of security because it complies with the highest quality standards, thanks to a multilevel controlled production process.



Contact us: IPV Pack looks forward to meeting you to design custom packaging for your pet food products together!

follow us:


ipvpack.com

IPV PACK is an Industry 4.0 company certified in accordance with BRCGS PACKAGING MATERIALS and UNI EN ISO 9001:2015



Nutritional needs of geriatric cats – time for a change?



With cat lifespans lengthening, there is increasing interest in how nutrition can affect the feline aging process.



Sarah-Jane Molier
Veterinary Surgeon

A number of age-related physiological changes respond to nutritional intervention, such as immune function and cognitive changes. It follows that tailored nutrition for senior cats is desirable.

Geriatric cats and diet

Aging is a complex, multifactorial process. Cats are generally considered senior when they reach 8 to 10 years of age. A 2023 study led by the UK's Waltham Petcare Science Institute used disease diagnosis data to define 5 life stages in cats (youth: 1-4 years; early midlife: 5-9 years; late midlife: 10-11 years; senior: 12-13 years; and super senior: 14+ years).

A cat's physiology and metabolism alter as they age, with changes including increasing levels of pro-inflammatory markers, insulin resistance and loss of muscle mass and strength.

Evolving knowledge

Past studies have looked at the effects of a multi-nutritional supplement (including antioxidants, a prebiotic, omega-3 and omega-6 fatty acids) on both longevity and quality of life. Findings concluded that enhancing nutrition with the appropriate supplements can improve both quality of life and lifespan, when compared with a standard complete adult cat food.

A recent review from a team of researchers in New Zealand, published in *Animal Frontiers* this year, summarized publications on aging and nutritional requirements in cats, looking at evidence for specific nutrients which could be beneficial in age-related illnesses.

[▶ SEE NEXT PAGE](#)

Findings concluded that enhancing nutrition with the appropriate supplements can improve both a cat's quality of life and lifespan.

Decreasing digestive ability

Research shows that a cat's ability to digest fat, and to a lesser extent protein, decreases with age. The 2024 Animal Frontiers review found that the format of the diet fed and the nutrient profile may influence the extent of this reduced digestive ability.

The American Association of Feline Practitioners (AAFP) advises reduced caloric intake for cats aged 7 to 11 years, but that cats over 12 years of age have increased daily energy requirements. At the same time, medical conditions, cognitive dysfunction, reduced gastro-intestinal function and dental disease can all affect a cat's food intake as they age. Digestibility comes into play here, with highly digestible proteins and a calorie-dense diet being especially important in these cats.

Muscle wastage

A review article from 2020 published in Veterinary Clinics: Small Animal Practice compared the nutritional needs of healthy cats against cats with conditions believed to be influenced by diet. The author suggests that highly digestible diets rich in omega-3 fatty acids and antioxidants can slow the progression of sarcopenia (age-related muscle wastage).

This study is cited and used in the 2021 Feline Senior Care Guidelines from the AAFP, published in the Journal of Feline Medicine and Surgery, which recommend puzzle feeders and toys alongside diet for preserving muscle mass (independent of illness).

The microbiome

It has long been acknowledged that feeding a phosphorus-restricted diet can improve survival times in chronic kidney disease (CKD). Similarly, canned diets are beneficial for improving hydration. However, it has more recently been hypothesized that the gut microbiome could also play an important role in health and well-being during the aging process generally, and specifically in CKD.

A very recent review from the US, published in Veterinary Journal, looked at the importance of the gut-kidney axis in CKD, a common disease of elderly cats. The authors propose that CKD is linked to dysbiosis (alteration of both microbial composition

and function), which can worsen CKD, due to systemic inflammation and the accumulation of toxins.

The review concludes that dietary intervention, probiotics and preventing constipation may all prove beneficial in CKD.

Time for change

The typical 'senior' diet may be antiquated, introduced when cats only tended to live to around 12 years. Perhaps it's time to reconsider senior diets, with a more tailored approach for each elderly life stage. While further research is needed, better defined age clusters may well guide the key stages for nutritional alteration.

Nutritional intervention is likely to be more beneficial when implemented at the optimum time, before age-related changes begin. The exception is specific therapeutic or 'prescription' diets, which should only be implemented once a specific condition has been diagnosed, and as advised by a veterinarian. ♦



Nutrients with proven efficacy in cats

The Animal Frontiers review summarizes nutrients that have proven efficacy in aging cats, namely:

- **Improved immune function:** vitamin E, correct omega 3:6 ratios
- **Cognitive function:** vitamin E, vitamin C, arginine, thiamine, riboflavin, pantothenic acid, pyridoxine, cyanocobalamin, folic acid, EPA and DHA
- **Longevity:** vitamin E, β -carotene, linoleic acid, chicory root

Naturally, the recommended safe levels need to be adhered to.



CLASSIC UNITED KINGDOM

A pet industry global icon

For half a century, the Classic brand has been more than just a name in the pet industry – it's a symbol of British ingenuity, quality and reliability. And Classic's future trajectory is just as ambitious and promising as its illustrious past.

In a world of fleeting trends, Classic stands alongside a 'select few' of instantly recognizable pet industry brands. A Classic bottle is immediately identifiable – a true icon in its field. This level of brand recognition is reserved for only a handful of products.

Part of that recognition comes down to loyalty and long-running partnerships. Since the first Pets at Home store opened its doors in 1991, Classic bottles have constantly been on the retailer's shelves. That's a rare achievement, underlining the bottles' timeless appeal and also Classic's reliability.

A testament to excellence

While major distributors typically champion their own brands in the pet industry, Classic's bottles have consistently bucked this trend.

This unwavering support from industry giants speaks volumes about the respect and trust Classic commands.

Classic bottles stand firm. Why? Maybe it's because the company's commitment to excellence has never wavered. Perhaps it's a resounding endorsement of the enduring legacy of the Classic name.

Or it could be due to the fact that the company has refused to cut corners on the quality of its UK-sourced components, underpinned through rigorous quality control processes, which ensure that every Classic bottle lives up to its name.

50 years, 30+ countries, unlimited opportunities

With a presence in over 30 countries, Classic proudly celebrates 50 years as a market leader – a testament to its dedication to quality, innovation and customer satisfaction.

How does the company plan on celebrating this 50th-anniversary milestone? In true Classic fashion!

Cutting-edge, customizable bottles are now available, tailored to customers' unique requirements.

With a rich history, global reach and a commitment to excellence, Classic remains the benchmark for small-animal drinking bottles. This dedication has established the company as a cornerstone of Great British industry and is proof of its enduring legacy. Not many brands can say that – but not everyone is Classic.

The Classic range

Aside from its famous bottles, Classic's range of premium-quality products extends to a market-leading assortment of aquarium ornaments, a full and diverse array of cages, as well as toys and accessories for dogs, cats, small animals and birds, all of which showcase the same 'Classic quality'. ♦

Caldex Holdings Ltd
classicpetproducts.co.uk

Indicators of change in the small pet market



Although cats and dogs remain the most popular choices of pet, increasing awareness of the appeal of alternative companions is beginning to speed up product innovation.



Edgar Maciel
Contributor
PETS International

The small pet, rodent and bird market has historically ranked bottom in terms of popularity. With fewer households owning these types of pets, sales figures and their financial impact have been less significant in retail. But since the pandemic, 'other pets' have been winning over consumers.

A more affordable option

The most recent relevant study by Packaged Facts predicted that the sector would reach \$3.6 billion (€2.8B) in sales in the US by 2023, representing a growth of about 4% compared to 2022, and continuing an upward trend since 2020.

Smaller pets are more affordable to maintain compared with dogs and cats, which is particularly appealing during challenging economic times. Just over half (51%) of small pet owners in the US said the cost of setting up

habitats and tanks for their pets is reasonable, with only 22% disagreeing. This indicates that marketers should focus on promoting the affordability of these pets by highlighting the lower costs involved in their care.

Companions for small spaces

The 'pets as family' attitude is on the rise in this segment too, with 69% of the owners of small pets now seeing them as part of the family.

Although this sentiment is less common than with dog owners (97%) and cat owners (95%), it presents an opportunity for marketers and retailers to further engage small pet parents by emphasizing the important role these companions can play in their daily lives.

In Europe, although the pace of growth has slowed post-pandemic, small pets are still very popular. It is younger pet parents, especially those living in smaller spaces, who are driving demand for high-quality products that align with broader health and natural ingredient trends.

Mimicking natural diets

Much like the cat and dog sectors, this segment is also undergoing a significant process of premiumization. One of the main demands from pet owners is for more natural and healthier food options, reflecting the growing desire to provide pets with high-quality nutrition that aligns with their health and well-being. Pet players operating in the category say that this trend is strongly connected to the new profile of small pet owners, particularly Gen Z and millennials, who are committed to learning as much as possible to ensure the well-being and longevity of their pets.

Following this trend, UK-based small pet food firm Supreme Pet Foods recently launched a dedicated line for rabbits and guinea pigs aimed at replicating the foods these animals would naturally consume in the wild. The goal is to encourage natural behaviors and satisfy their instincts to forage.

"The trend for natural, healthy nutrition shows no signs of slowing. Pet parents are looking for products that are

free from artificial flavors or colors and rich in natural ingredients. And that's great news for small pet health and well-being," says Claire Hamblion, the company's Marketing Director.

Engagement and play

In addition to nutrition, the small pet market is increasingly focused on creating alternatives that encourage more physical activity and fun for these smaller animals. The traditional idea of keeping hamsters and guinea pigs, for instance, confined in cages is rapidly changing. Pet owners now seek to connect more deeply with their pets, engaging in play and other interactive activities.

Ethan Haber, a hamster lover, had long been frustrated by what he saw as a lack of innovation in the small pet market. While walking through New York's parks, he often saw hundreds of dogs and cats enjoying the outdoors with their owners and wondered: "Why can't I do the same with my hamster?"

► SEE NEXT PAGE

CéDé[®]
Eggcellent egg food!

Trusted formula,
new design!



Eggs-tra
info



for us it's a
"piece of cake"

The unique CéDé egg cake is the foundation of all CéDé egg foods. We bake it ourselves since 1954 with **real eggs**, flour and lots of craftsmanship. This makes CéDé[®] eggcellent egg food, **by and for bird lovers!**

www.cede.be
CéDé is part of pet supplies specialist Laroy Group.

Made
in
GERMANY



BENEFITING FROM

Natural Products

IN SUPER-PREMIUM-QUALITY



HIGHEST QUALITY & LOVE FOR DETAIL

For over 35 years, we have been passionately developed super-premium products for small animals, carefully crafted to reflect their natural habitats. We're grateful for the trust of many satisfied owners and the vitality of happy, healthy pets.

PREMIUM FOOD, SNACKS & MORE

Discover top-quality products for small animals – from complete foods and snacks to premium hay, bedding, and accessories. Guided by our motto 'In harmony with people, animals, and nature,' our dedicated team brings this philosophy to life with passion and expertise.

OUR MISSION: NATURAL PRODUCTS FOR HEALTHY, HAPPY ANIMALS

By focusing on each animal's natural needs, using high-quality ingredients, unique formulations, and gentle processing, we bring more vitality and joy to their lives.



The first idea came to him in 2019, but it was during the pandemic that he developed a prototype for a small pet exercise ball and unique carrier, which launched 2 years later under the brand name Halo.

“There hasn’t been any innovation in the small pet space for about 40 years. So, our ball is an upgrade. It’s a great value proposition, allowing pet owners to take the animal out of their cage,” he explains. The product has a production run of over 5,000 units and Haber’s company, Happy Habitats, has recently received an order from Canadian retailer Pet Valu.

Keeping it simple

Happy Habitats sells other products for small pets too, including an all-natural treat formula containing only 2 ingredients – with oats as the base and no preservatives – which won an award for best small pet treat at SUPERZOO. “When you look at pet store shelves, you see a bag of treats with 12 ingredients. It shouldn’t be that complicated for a carrot-flavored treat – it should just be carrots,” he says.

In-store guidance

The pet specialty channel dominated the US small pet product market in 2022, accounting for 60% of total sales. According to Packaged Facts, online sales only represented around 20%, partly due to the logistical challenges of shipping larger habitats and enclosures. And industry players expect offline shopping for this category to remain the most popular, with owners given the opportunity to discover the full product range in-store.

Jason Savitt, President of Prevue Pet Products, a Chicago-based manufacturer of pet supplies, explains: “In this niche market, customers need to be educated and guided. That’s why offline sales have an advantage over online shopping. They need to understand, for

instance, why their small pets require a larger space, and the health and quality-of-life benefits it provides. This is something online shopping still struggles to deliver.”

Where to go from here

The industry believes that the small pet category has a promising future, with brands launching products that cater to owners’ new desires. As Hamblion says: “We’re seeing more new healthy, natural products as the demand for premium items continues to grow.”

On the other hand, Haber believes there is still a lack of innovation in small pet products. Happy Habitats plans to launch other sizes of its exercise ball and expand into new product lines, including toys, accessories and equipment. “There’s little competition in the small pet space, so the opportunity to innovate is huge if you can seize it – and that’s what we’re aiming to do.”

Priorities for future innovation

While there is still a gap in the market, some players believe it is beginning to narrow – as more specialized products are being developed. Savitt says that Prevue does see new opportunities. He explains that there is a growing trend of owners providing their small pets with more living and playing space, as long as the design is attractive.

“These species have become more popular in recent years, and creating an environment that’s suited to their habits and safety has been a focus for us,” he adds. This trend has driven companies like his to develop habitats that cater to the unique needs of specific pets. For instance, Prevue has introduced enclosures with tighter wire spacing to ensure safety.

When it comes to innovation for small pets, Savitt identifies 3 key priorities for the market: offering smaller bar spacing; providing larger habitats for more playing space; and ensuring that the enclosures are designed to complement home decor. ♦

It is younger pet parents, especially those living in smaller spaces, who are driving demand for high-quality products that align with health and natural ingredient trends.

Could blood proteins boost a dog's gut health?

New research explores the potential of plasma in a dog's diet to support gut health.



Esther Prevo, PhD
R&D Manager
Darling Ingredients International
darlingii.com

Gastroenteritis, an inflammation of the stomach and intestines, is a common condition in dogs. It is often triggered by an imbalance in the gut microbiome, viral infections like canine parvovirus (CPV) or food allergens. When these factors come into play, the immune system is activated, producing inflammatory cytokines. This inflammation damages local tissue and weakens the protective mucus layer in the intestines.

The potential role of plasma

Current treatments focus on dietary changes, antibiotics and immunosuppressants. However, emerging research points to an additional avenue of support: blood plasma. Plasma proteins can support gut health through 2 main mechanisms. First, the Fab arms of immunoglobulins bind to pathogens, potentially reducing infections and inflammation by preventing harmful interactions between pathogens and the gut lining.

Second, the Fc tail of the immunoglobulin may engage with the local immune system, dampening the inflammatory response. This reduction in inflammation can help protect the gut lining, allowing it to heal and restoring its ability to absorb nutrients effectively.

Blood plasma has shown promising results in supporting intestinal health across various mammal species. For example, studies on piglets and calves experiencing gastrointestinal problems have demonstrated that bovine and porcine plasma can

provide protective effects similar to those of breast milk. This has led Darling Ingredients to develop Proglobulin®, aimed at achieving similar benefits for people's canine companions.

What is Proglobulin?

Proglobulin is spray-dried blood plasma, used for bio-functional gut health. It consists primarily of proteins (approximately 80%), along with minerals and water.

The majority of the proteins are albumins and globulins, including antibodies that are crucial for maintaining a healthy immune system. Among these antibodies, immunoglobulin G (IgG) is the most abundant, but IgA and IgM are also present.

In addition to immunoglobulins, Proglobulin contains other bioactive components such as immune factors (transferrin, interleukins and cytokines) and cellular growth factors (IGF 1, IGF 2, EGF and TGF β). These elements collectively contribute to its potential in supporting immune and intestinal health in dogs.

Research partnership

In a partnership between Darling Ingredients International/Sonac and Wageningen University, researchers are investigating the effects of porcine plasma proteins – and specifically Proglobulin – on the canine gut.

Drawing on data from studies in piglets, the research aims to explore how plasma proteins can help regulate the immune response in dogs with gastrointestinal problems. It is hoped that the research findings will eventually lead to better intestinal health and overall well-being for dogs. ♦



Fermentation fix: enhancing pet gut health

Consuming fermented foods for their health benefits is hugely popular among humans, but could this be the next big thing for pets and their digestive wellness?



Jelena Šuran
Chief Executive Officer
Apiotix Technologies

Among humans, eating fermented foods is now regarded as an essential part of taking care of one's overall health. This is backed by significant evidence, so it's no wonder there is a growing interest in how these foods might benefit pet companions.

Effects on gastrointestinal health

Fermented food's effects on humans have been well studied and shown to improve health in numerous ways, from the effects on microbiome and digestibility to enhancing mood. Fermentation makes food more absorbable by pre-digesting certain components and reducing the presence of anti-nutritional factors that inhibit digestive enzymes, such as trypsin inhibitors.

This is particularly relevant for dogs and cats, as their digestive systems can benefit from the enhanced nutrient availability that fermentation provides.

For instance, the addition of fermented ingredients, such as fava beans and pea starch, has been shown to improve palatability and nutrient absorption in dogs and cats, leading to better overall digestive health.

Additionally, fermented foods can introduce beneficial microorganisms into the gut, which benefits the overall gut microbiota, and enhances immune function and nutrient assimilation.

Kefir in companion animals

One of the most popular and praised naturally fermented foods is kefir, a traditional fermented milk product containing more microorganisms such as lactic acid bacteria, yeast and acetic acid bacteria. Its effect on dogs' gut health has been investigated in several studies.

[▶ SEE NEXT PAGE](#)

The addition of fermented ingredients has been shown to improve palatability and nutrient absorption in dogs and cats.

The most recent study, led by the University of Illinois, investigated how kefir affects macronutrient digestibility, fecal characteristics, microbiota composition and metabolite and immunoglobulin A concentrations in healthy adult dogs.

12 dogs were fed either traditional kefir, commercial kefir or a control milk-based product for 28 days. Kefir products differed in microbial density and profile. Overall, kefir had a minor impact on gut microbiota and metabolites but did not significantly alter the dogs' overall digestion or immune markers. Fecal microbiota populations were weakly impacted and the effect on nutrient digestibility was negligible. Traditional kefir was found to increase beneficial bacteria such as *Lactococcus*, and commercial kefir increased *Fusobacteriota* levels.

This partially confirmed the findings of a previous South Korean study published in the *Journal of Dairy Science*. The study evaluated the impact of kefir on gut bacteria in 6 healthy adult dogs. These dogs were given kefir for 2 weeks, and their gut microbiota was analyzed before and after the supplementation.

Results showed significant changes in the gut bacteria: the relative abundance of beneficial bacteria families, like *Prevotellaceae*, increased, while potentially harmful ones, such as *Fusobacteriaceae*, decreased. Additionally, kefir increased the population of lactic acid bacteria, which are known for promoting gut health.

Importantly, no negative side effects were observed, suggesting kefir could be a promising probiotic supplement for improving dog gut health. The authors concluded that "kefir may be applied as a novel functional pet food supplement to improve the quality of life of dogs, much to their owners' satisfaction".

Caution over labelling

Although evidence of the potential of kefir to improve the gut health of companion animals exists, there is a problem with variability and reproducibility. A study evaluating the accuracy of labelling regarding probiotic content in 6 kefir products found that many of these products overstated the number of live microorganisms, often by a significant margin, and that the specific bacteria listed on the labels were often incorrect.



In fact, none of the products contained only the microorganisms listed, and all had additional bacterial species that weren't disclosed. Some products made health claims that were unsupported by scientific evidence. This highlights the need for stricter regulations and better labelling accuracy for probiotic products intended for pets.

Other fermented products

And how about fermented vegetable products, such as kimchi, sauerkraut and others? There is simply not enough evidence of their health benefits in dogs and cats in the literature. Still, this doesn't mean that these foods don't provide any – only that more studies are needed.

However, there is evidence of the effects of fermented meat, such as *Pediococcus* spp.-fermented chicken meat as a snack for dogs. Results showed that fermentation increased lactic acid bacteria levels, lowered pH and improved pepsin digestibility of the snack. Additionally, fermented snacks exhibited better preservability, with lower bacterial growth compared to non-fermented snacks.

These findings suggest that *Pediococcus* spp.-fermented chicken meat could enhance the nutritional value and shelf life of dog treats, making them a potentially beneficial option for canine diets.

Looking forwards

Recent studies have shown that the inclusion of fermented ingredients in pet food or feeding animals fermented foods like kefir, might be beneficial in terms of improving digestibility, nutrient availability and gut microbiota.

However, these effects are also variable, and more comprehensive research with larger numbers of animals is needed to confirm their overall efficacy and long-term benefits. Until more robust data is available, claims about the widespread advantages of fermented foods for pets should be approached with caution. ♦



Gain an edge in a hungry market with functional pet treat solutions

Deliver pet treats and supplements with great taste and functional benefits by harnessing our broad portfolio of science-backed ingredients, formulation expertise, and end-to-end support.



DIGESTION



WELLNESS



MOBILITY



CALMING



SKIN



DENTAL



LONGEVITY

Let's Collaborate

+1 844-4413663

petnutrition@adm.com

Reflex[®] PLUS

Tailor-Made Perfection

Super
Premium
HYPOALLERGENIC
Breed
Series

