



# PETS International

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MAR 2025

## TREND REPORT

# CONTROLLED SUBSTANCE: DOES CBD HAVE A FUTURE IN PET CARE?

## REGIONAL ROUNDUP

Tracking the  
fast-moving  
markets of India  
& the Middle East

## VET CARE SNAPSHOT

Research on the  
state of veterinary  
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# Considering consequences

What was once a political slogan has become reality: the new US administration's approach to tariffs is keeping the world – including our industry – on high alert. With the US accounting for approximately 40% of the global pet market, any shift in trade policy will have direct consequences.

Recent announcements confirm that 25% tariffs will apply to exports from Canada, Mexico and the EU – a move expected to impact the agricultural sector and potentially the raw materials used in pet food production.

In this issue, we explore general pricing trends in a post-inflationary environment, at least for now. What happens in the coming months as these tariffs take full effect remains uncertain.

As we approach Zoomark in Bologna in early May, we've launched a survey to discover how pet trade fairs are shaping the business. Your input is invaluable – just scan the QR code below to participate.



Results will be sent to your email, and we will publish an analysis in our upcoming issue.

Thanks for your support and wishing you an insightful read,

David Palacios Rubio  
Editor-in-Chief



“The way to get started is to quit talking and begin doing.”  
WALT DISNEY, FILM PRODUCER



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### Amazon's launch in Ireland set to grow pet goods market

Amazon has announced it is preparing to launch a new website for Irish consumers in 2025.

A company representative confirmed that although pet food is already available to Irish customers through Amazon's UK site, it may be subject to import charges that an Ireland-based website would avoid.

"The store is great news for Irish customers and businesses alike, and we're taking another big step towards launching amazon.ie by opening our doors for businesses to join us as selling partners ahead of launch," says Amazon Country Manager Alison Dunn.

### US pet industry welcomes agriculture and health appointments

President Donald Trump's appointments of Brooke L. Rollins as US Secretary of Agriculture and Robert F. Kennedy Jr. as Secretary of Health and Human Services (HHS) are expected to influence the US pet food industry's regulatory landscape.



In her role at the US Department of Agriculture (USDA) Rollins is expected to oversee agricultural policies, including animal feed and pet food manufacturing regulations. The American Feed Industry Association (AFIA) congratulated Rollins, emphasizing the importance of continued collaboration between the USDA and the feed industry.

As Secretary of HHS, Kennedy will oversee agencies such as the Food and Drug Administration (FDA), which regulates pet food safety and ingredient standards. The industry also welcomed Kennedy's appointment and highlighted the FDA's role in continuing a science-based regulatory approach.

### TNC boosts presence in premium pet nutrition

Swedish pet nutrition business, The Nutriment Company (TNC), kicked off 2025 with 2 acquisitions in the UK to add to its health food portfolio.

The company bought The Dog's Butcher, which creates raw food marketed "for working dogs", and Your Pet Nutrition, a supplement business.

In addition, TNC recently announced its takeover of Puromenu, a Spanish raw pet food company as part of its expansion strategy of entering high-growth regions.





### Maxi Zoo France to expand store network as omnichannel sales rise

Fressnapf Group subsidiary Maxi Zoo plans to open 65 new stores in France this year, aiming to expand from 386 locations to 600 by 2028.

According to Expansion Director Rémy Brun-Lafleur, the company's strategy is to diversify its locations by adding to its rural offerings. The company also plans to test-run a city-center store format.

Maxi Zoo France posted omnichannel sales of nearly €602 million (\$632.5M) in 2024, a 12% increase from the previous year. Most of the growth came from stores, but the retailer's e-commerce business posted more than 7% growth.



### Nestlé pet care posts mixed results

Although Swiss-based Nestlé hit group sales of F91.4 billion (\$101.1B/€96.8B) in 2024, a 1.8% decrease, sales for Nestlé Purina increased from F18.86 billion (\$20.83B/€19.98B) in 2023 to F18.88 billion (\$20.85B/€20B) in 2024, a 0.12% YoY increase. The company says this growth was driven by science-based brands like Purina ProPlan, Purina ONE and Friskies.



In North America, company-wide organic growth declined by 0.5%. Nestlé highlights negative pricing, partly driven by "competitive dynamics" in pet care. However, the segment was also the region's largest growth contributor.

In Europe, the company has seen growth in pet care market share. In Asia, Oceania and Africa, Nestlé says it has "reignited growth momentum" in pet care, while Latin American pet care growth was flat.



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## Pet food at forefront of MiAlgae strategy

Scottish biotech firm MiAlgae, which produces omega-3s from algae, is confident it can “transform” the pet industry with its sustainable solution, and is considering expanding to the US and Australia after it builds a facility in Scotland this summer.

Edinburgh-based MiAlgae is part of Mars Petcare’s Next Generation Pet Food Program, a sustainability partnership with pet startups, and in 2024, it was a finalist for environmental award, the Earthshot Prize.

Jo Partridge, MiAlgae’s Operations Director, says the company’s omega-3 products are being tested by pet food makers and that MiAlgae wants to become a global partner for companies using omega-3s, with particular interest in the US and Australia.



## Freshpet hails breakout year as it nears \$1 billion in net sales

New Jersey-based Freshpet has posted strong Q4 and 2024 fiscal year earnings. Net sales for the quarter reached \$262.7 million (€251.3M), a 22% year-on-year (YoY) increase.

Between October and December 2024, net income hit \$18.1 million (€17.3M), an 18% YoY increase against the same quarter last year. Adjusted earnings before interest, tax, depreciation and amortization (EBITDA) were \$52.6 million (€50.3M), up from \$31.3 million (€29.9M) in the prior financial year.

2024’s net sales reached \$975.2 million (€932.8M), an increase of 27.2% against 2023. Net income was positive for the first time in the company’s history, reaching \$46.9 million (€44.9M), a significant improvement on 2023’s net loss of \$33.6 million (€32.1M). The growth came largely from increased volume, which rose 27% in 2024.

## Ukrainian pet companies bolster production as conflict continues

After facing significant challenges since the outbreak of war, Ukrainian companies Suziria, a leading pet retailer and manufacturer, and Kormotech, a major pet food producer, have invested in expanding production capacity to meet growing demand.

Suziria has invested in boosting its production and warehouse facilities in the west of Ukraine, further from the Russian border. It also opened a production facility in Kalush in southwestern Ukraine in 2022.

Since the war began, the firm’s market share in Ukraine has increased. In 2022, it was 10.7%, which rose to 14.1% in 2024.

Kormotech consolidated much of the country’s market during the earliest months of the war as, based in the western city of Lviv, it was somewhat insulated from the physical impacts of the war. To avoid disruption, the company opened a facility in Poland in 2022 and is now expanding its production plant in Lithuania, which opened in 2020.





## PET INDUSTRY FACT FILE

### DATA INSIGHT

# 20%

of US pet parents interviewed by Figo Pet Insurance admit they would like to take their pets to the movies with them – but the number increased to 25% among millennials.

### NEW APPOINTMENTS

#### Petco

The pet retailer has made 3 new appointments:

Sabrina Simmons (Chief Financial Officer), Michael Romanko (Chief Customer and Product Officer) and Jack Stout (Chief Merchandising Officer).

#### AlphaPet Ventures

The European online pet food platform added 2 new members to its board: company co-founder Stefan Pfannmöller and former Zooplus COO Mischa Ritter.

### TOP 3 INVESTMENTS

**Napo**

London-based pet insurance startup **Napo** closed a €14.4 million (\$15.1M) Series B funding.

CBD dog products firm **Kradle** closed a Series 3A round of investments worth \$4 million (€3.8M).

**Kradle**

**Lupa**

British tech firm **Lupa**, owner of AI-native veterinary practice management software, closed a £3.3 million (\$4.1M/€4M) investment round.

### TOP WEB NEWS

## United Petfood gains in 2024

Analysis by S&P Global found that the Belgian private label player performed better than expected last year thanks to decreasing costs and stable prices.

**LATEST NEWS**







Country report: India

# Rapidly changing attitudes to pets drive business boom

The pet industry in the world's most populous nation is witnessing the entry of several new players, while the march of e-commerce is changing the retail landscape. We look at how the country's pet sector is developing.



**Devika Singh**  
Contributor  
*PETS International*

The Indian pet industry is on the up. Not only has the rise in pet ownership led to greater demand for products, but consumer preferences have evolved towards better products and services.

## From pet owners to pet parents

Players from across segments have entered the industry to cater to this increased demand and have positioned themselves in different price categories.

The relationship between Indian consumers and their pets has changed in recent years, especially since the COVID-19 pandemic. Whereas previously most pets were dogs kept as guard animals, they are now increasingly considered part of the family.

A recent survey conducted by Mars Petcare among 1,200 Indian pet parents concluded that about 67% of Gen Z consumers and millennials said that pets were the most important part of their lives.

This companionship trend is driving pet ownership in the country. According to a report by market intelligence firm Redseer Strategy Consultants, the pet population in India jumped from 26 million in 2019 to 42 million in 2024. As more consumers are now adopting pets, they are also seeking improved products and services for them. This has led to rapid growth in the segment from \$1.6 billion (€1.55B) in 2019 to \$3.6 billion (€3.5B) last year.

## Dogs dominate

Dogs are the most popular kind of pet in India and account for about 70-75% of the country's pet care market. Cats are a distant second at 25-28%, and the rest of the business comes mostly from products catering to fish.

"We do not have accurate numbers for fish food in India as it is largely unorganized. There are several aquariums that sell fish food and are unregulated, and people also prepare feed at home so it is difficult to give a correct estimate for the segment," says Rama Krishna JS, Business Head at Growel Pet Nutrition, a leading Indian aquaculture player based in Andhra Pradesh.

[▶ SEE NEXT PAGE](#)

### New players entering the fray

The Indian pet care market is currently dominated by Mars Petcare, with a 50% share. Mars entered India in 2002 and is owner of major brands such as Pedigree, Royal Canin and Whiskas.

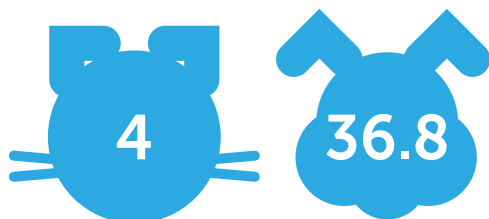
“Increased awareness of pet nutrition has fundamentally transformed buying patterns in India, with pet parents now prioritizing complete and balanced diets over traditional feeding practices like table scraps or home-cooked meals,” says Salil Murthy, Managing Director of Mars Petcare India.

Since the pandemic, however, several new players have entered the market or have changed their strategy to gain a bigger chunk of it. Fast-moving consumer goods (FMCG) players especially have shown a keen interest in the segment. In 2022, for example, Nestlé India bought Purina Petcare India for Rs 125 crore (\$15.06M/€14.60M).

### FMCG players lead the way

Other major FMCG entrants include Emami – a leading personal care and healthcare company in India with more 300 products based on Ayurvedic formulations. It has acquired strategic stakes in pet care startup Cannis Lupus and Mumbai-based Godrej Consumer Products, which reportedly intends to invest Rs 500 crore (\$59.5M/€54M) over the next 5 years.

### Indian pet population (2024 forecasted, in million)



Source: Euromonitor International

***A recent survey among 1,200 Indian pet parents revealed that about 67% of Gen Z consumers and millennials said that pets were the most important part of their lives.***

Meanwhile, aquaculture feeds company Growel Group has announced plans to invest \$11 million (€11.1M) to expand into the broader pet industry over the next 5 years, starting with the launch of dog treat brands.

“In the pre-COVID period, the Indian pet industry was growing at a compound annual growth rate (CAGR) of 15-16%. But now it is growing at 25-30% and we expect it to continue growing at over 20% year on year going ahead,” adds Rama Krishna JS.

### Smaller cities are the next frontier

Pet ownership is not only growing in major urban areas. Beyond India’s top 8 cities, consumers from smaller ‘Tier-2’ cities are also increasingly adopting pets.

These centers have a population of 50,000 to 99,999, according to the Reserve Bank of India’s classification based on the 2011 Census. Therefore, several companies – including Growel Group – are expanding their reach and launching new stores and centers in these towns.

“Though the top 8 cities in the country contribute 40-50% of the business, pet ownership has been increasing in Tier-2 towns and they have emerged as the next frontier of growth. The pet food business in Tier-2 towns is growing by over 40% year on year, compared to 22% growth being witnessed in the overall pet food business in the country,” explains Rama Krishna JS.

Similarly, Zigly – an omnichannel pet care brand that offers products as well as services such as grooming and medical care to pets through its 30 experience centers plus its e-commerce channel – has its sights set on Tier-2 cities. To pass the 50 center mark,



the company is looking at opening 20 more centers in 2025, in towns such as Jalandhar and Amritsar, with a particular focus on the southern and western regions of the country.

"About 50% of our centers today are in metros and a few in Tier-1 and 2 towns but going ahead we are planning to introduce more centers in smaller towns," says Akshat Singh, Assistant General Manager – HR and Retail, Zigly.

### The e-commerce juggernaut

E-commerce has emerged as a major sales channel for companies operating in the pet care segment in India. The channel made a fractional contribution of about 5-10% to the industry's sales before the pandemic.

Now, however, most brands report garnering about a 25-30% share of their sales through e-commerce. The remaining 70% comes from offline retail channels that include kirana stores (small family-run grocery shops), pharmacies and dedicated pet care outlets.

According to Shashank Sinha of dog food producer Drools, there are about 15,000 dedicated pet shops in India besides kirana stores and modern trade stores that sell pet products. Drools, he said, is present in 35,000 stores, while the competition has a presence in 65,000 stores.

"The retail landscape is changing quite dynamically. About 7 years back, e-commerce players such as Amazon and Flipkart contributed about a 5-10% share of pet care sales in the country, but now they contribute a 25-30% share," says Rama Krishna JS of Growel, who has also worked with brands such as Royal Canin and Mom and Paw.

### Quick commerce expands the fastest

Mars Petcare and Drools derive about 25-30% of sales from e-commerce. In particular, quick commerce platforms such as Swiggy Instamart, Zomato's Blinkit and Zepto have seen rapid recent growth in the



country. According to Murthy of Mars Petcare India, quick commerce is the fastest-growing segment within e-commerce for the company.

"Platforms like Swiggy Instamart, Zepto and Blinkit align with consumer demands for speed and convenience, often offering competitive pricing. These platforms make it easy for pet parents to add pet essentials to their carts during regular grocery shopping," he states.

Likewise, the quick commerce channels consider pet-related products an important area. "Pet food is a popular category on our platform. Within this category, dry dog food and fish food stand out. Additionally, on Zepto, you'll see a diverse assortment of pet treats and toys, along with pet grooming and hygiene products, which also see high traction on our platform," says Suraj Sipani, Category Director, Zepto. [▶ SEE NEXT PAGE](#)

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*Industry stakeholders are working on increasing awareness about the importance of proper nutrition as part of responsible pet adoption.*

### Beyond products into services

Another major pet care trend gaining ground is the growing demand for services. Indian consumers now want grooming and better medical provision for their dog or cat. There is also a demand for pet daycare and boarding, especially in metropolitan areas.

According to Singh of Zigly, whereas pet parents in the country were not previously concerned about how their pets looked, that has changed. "Consumers now want shampoos that suit their breed; we even have 10 different types of perfume. There is also a rise in demand for hair coloring amongst pet parents," he adds.

Zigly has also seen a rise in demand for organic products for pet care and grooming such as shampoos, balms and oils, as well as increased popularity of hemp-based pet grooming products.

### Roadblocks to growth

Despite witnessing growth on all fronts, there are still some roadblocks in the country's pet care industry's journey. One challenge is that a large share of the market remains unorganized.

Additionally, many Indian consumers prefer home-cooked food, even for their pets. To tackle this challenge, industry stakeholders are working on increasing awareness about the importance of proper nutrition as part of responsible pet adoption.

According to Redseer, as of financial year 2024, investors had infused \$180 million (€174M) into startups operating in the Indian pet segment. As a result, the industry has also seen the entry of several new companies that are trying to bring innovation to the segment.

On the product side, these include businesses such as dog food company Benny's Bowls and pet food and accessories business JUSTDOGS.

In the wellbeing realm, Supertails, India's biggest pet care app, has recently expanded its services offline with the launch of its first veterinary clinic in Bengaluru, with plans in motion to open a further 3 in the city.

Pet groomer Flying Fur, dog boarding, sitting and walking app PetBacker and pet moving service PetFly are further examples of companies offering innovative services. ♦



### Indian pet care market size (in million \$)

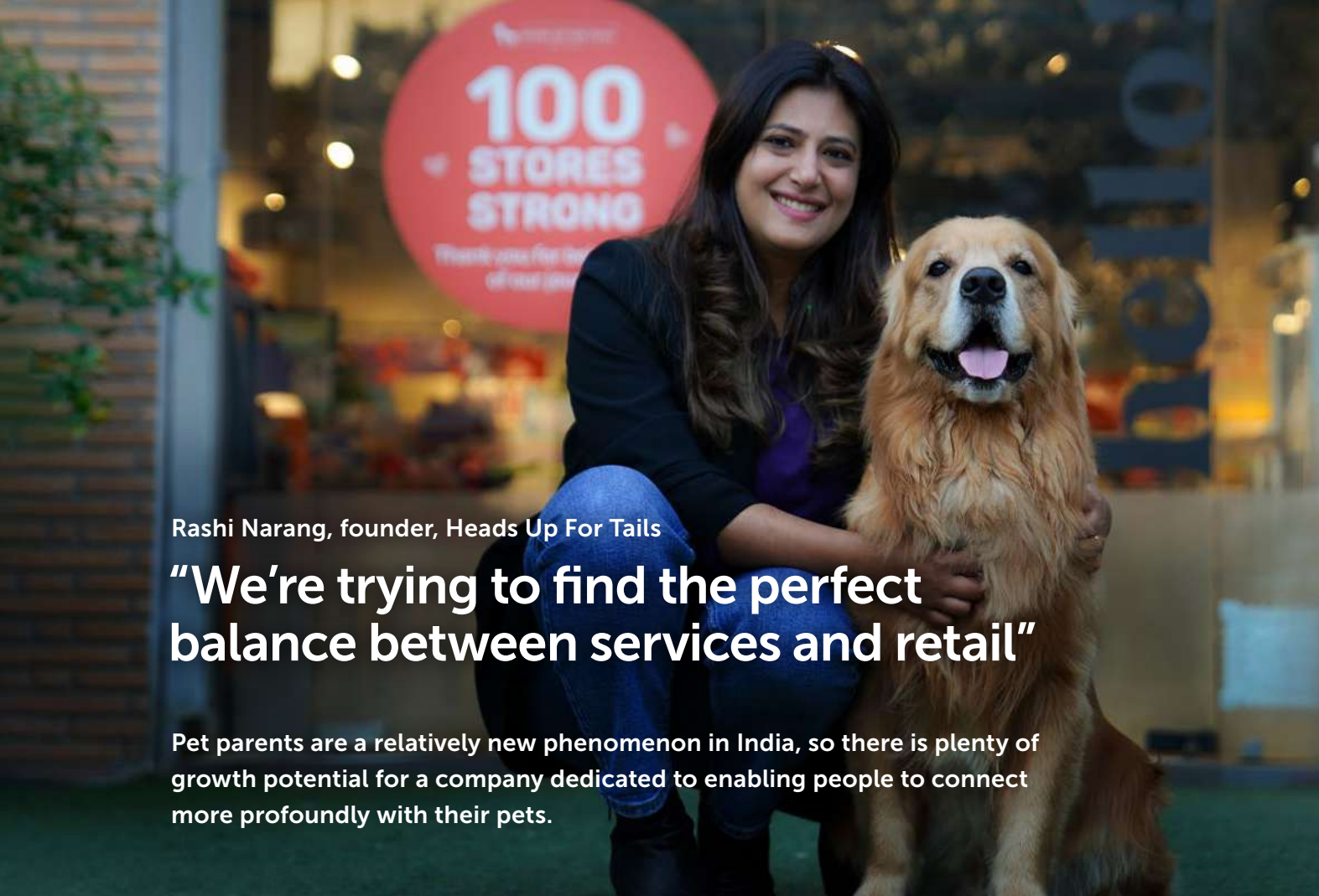
519.7 2021

613.5 2022

715.7 2023

825.6 2024 (forecasted)

Source: Euromonitor International



Rashi Narang, founder, Heads Up For Tails

## “We’re trying to find the perfect balance between services and retail”

Pet parents are a relatively new phenomenon in India, so there is plenty of growth potential for a company dedicated to enabling people to connect more profoundly with their pets.



**David Palacios Rubio**

Editor-in-Chief

GlobalPETS

Rashi Narang founded Heads up for Tails (HUFT) in 2008 after being disappointed with the selection she found on the market when looking for a gift for her own dog, Sara. Seizing the opportunity, she started the pet business, which now has 105 stores in 20 Indian cities. India’s pet retail market is very fragmented and HUFT has approximately 8-9% of the market with its stores and grooming spas, as well as an online shop.

Now, HUFT is in talks to close a funding round of \$25-28 million (€24-27M) and is aiming to become a ₹500 crore (\$58M/€55M) brand by 2027.

### *How did it all start?*

We started as a small, homegrown company – for a long time just me, researching and learning, since there was no existing business model to follow in India.

We introduced India-first products, but selling them was a challenge. I visited over 200 pet stores and all but one turned me away. The one store that said yes after a few months eventually merged with us years later.

### *You operate in the world’s most populous country. How challenging is that?*

It’s very challenging on multiple levels. When we started, we had to do more than just solve logistics, infrastructure and supply chain issues – and that continues today. Back then, we had to create a customer base from scratch, because awareness was so low.

While India has a long history of coexisting with dogs and cats, they were primarily used for guarding or security purposes. When we started, the mindset was more about pet ownership rather than pet parenting. Over time, we’ve witnessed a shift, with pets moving into homes, onto beds, and becoming true family members.



***"We've been offering grooming for 6 to 7 years now, and demand is growing quickly."***

Being part of this transition has been incredible. We've worked hard to promote that change through education, content and community building. Our goal is to help people truly connect with their pets, because pets make us better, more compassionate human beings.

#### **How does the Indian market compare to Western countries?**

In Europe and the US, many people are on their third, fourth or even tenth pet, whereas a large percentage in India are first-time pet parents who need to learn everything from scratch. India is also an extremely price-sensitive market.

Unlike in the West, where disposable income allows for higher spending on pets, Indian consumers need to see great value in what they're buying. Awareness is growing, but the core segment of engaged pet parents is still small.

There are plenty of pet lovers, but truly dedicated pet parents are a niche. That's why we advocate for pet parenting, helping people to understand the joy and responsibility that comes with truly caring for their pets.

#### **Have Indian pet parents changed their attitudes to commercial food?**

Around 90% of the Indian households still feed their pets fresh home-cooked food rather than packaged pet food. Cooking at home is deeply embedded in our culture. However, we are seeing a slow shift toward packaged food.

We started as a lifestyle brand, but in the past 4 to 5 years we've expanded into pet food, and now it accounts for over 50% of our business. A few years ago, we also introduced treats, and we've recently expanded into full meals.

Rather than competing solely on price with third-party brands, we wanted to create pet-first nutrition – clean,

preservative-free and made with pets as family in mind. This category is seeing the most growth. Besides food, grooming services are a strong area, along with toys and walking essentials like collars, leashes and harnesses.

#### **And what about services?**

As much as 60% of our revenue comes from our physical stores. Of that, grooming services account for about 15%, which is a significant portion. We've been offering grooming for 6 to 7 years now, and demand is growing quickly.

Traditionally, in India, most people bathed their dogs at home. But as pet parenting evolves, more owners are opting for professional services. This shift in demand is encouraging, and we see great potential for further growth in the service sector.

#### **How do you see your services offer evolving in the near future?**

Instead of focusing on retail-first stores with small spa areas, we are experimenting with spa-led stores that have smaller retail sections.

Our current spa spaces are quite limited, and we're constantly at full capacity, which means we have to turn customers away. We're exploring how deep this can go and trying to find the perfect balance between services and retail.

#### **Retailers worldwide are pushing more toward an online footprint. Is that the case for you too?**

From a profitability standpoint, offline makes more sense for us compared to online, where loyalty is much lower due to price comparisons. Actually, our average basket size offline is 18% higher than online.

Online customers tend to shop wherever they find the lowest price. In-store, our team builds relationships with customers. They know them and their pets by name.

We are developing a strong omnichannel strategy where customers can buy online, return in-store or have products delivered from our stores. Now that we have a solid retail network across the country, our focus is on optimizing both channels. [▶ SEE NEXT PAGE](#)



### *Quick commerce is consolidating as a retail channel in India...*

Quick commerce platforms operate through dark stores that service neighborhoods, meaning they can only stock fast-selling SKUs. These platforms focus on convenience rather than discovery, so we use them to list our bestsellers and fastest-moving products. Customers can get these products delivered in 10 minutes.

So far, we have seen this gaining traction, sometimes even struggling to keep up with demand. It is still early in our journey – we have only been listed on these platforms for a few months – but we see significant growth potential. We are on Blinkit, Zepto and Swiggy Instamart, with plans to expand to a few more new platforms soon.

While there's some concern about cannibalization of retail sales, quick commerce simply cannot match the range available in our stores. A typical quick commerce platform may stock 20 of our SKUs, whereas our stores carry over 1,000. For more in-depth shopping, customers still prefer visiting a store or shopping online.

### *How is your store network divided? Do you work with different price points depending on the location?*

Over the past 2 years, we've also worked on making our products accessible at different price points. Initially, we were more niche, catering to high-end consumers, but now we're expanding to serve a broader audience.

We have stores in malls, high streets and neighborhoods, each with a slightly different product mix based on local needs. Essentials like pet food remain constant across locations, but we're tailoring other offerings to fit different markets.

### *What is your target for store expansion over the next few years?*

We want to reach at least 250 stores in the next 3 to 4 years. We see plenty of room for expansion and are also keeping an eye on how online channels evolve. It is definitely the age of convenience, so we are working on balancing both physical and digital retail.

### *You are proud of featuring 'Made in India' products as a big part of your assortment...*

At one point, we were importing about 10 international brands and serving as their exclusive distributors. However, supply chain disruptions – especially during and after COVID-19 – made it increasingly difficult to manage supply and demand. Import costs, including logistics, duty and freight, have also risen significantly.

As a result, we have shifted our focus toward manufacturing in India, allowing us to control our supply chain better and be more agile in responding to market needs. This approach has been a key focus for us over the past year.

### *You recently opened a store at a New Delhi airport...*

As a team, and as pet parents, we realized that people often want to bring back something for their pets after a trip – just as they do for their kids. This led us to open our first airport store at New Delhi's domestic terminal, which aligns well with our target market.

The airport store has been great for visibility and discoverability, with strong sales and many new customers trying our products for the first time. It also allows us to reach pet parents from different parts of the country who might not otherwise have access to our brand.

While it is still early days – we've only been open for a few months – the response has been very positive, and customers are often delighted to find a pet store in an airport, as it is quite unexpected. This location is entirely dedicated to our brand, making it even more special.

### *In which local market do you see more potential?*

We are present in all Tier-1\* cities and are expanding into Tier-2 cities, with some Tier-3 experiments underway. Awareness is highest in Tier-1 cities, where pet ownership is growing, as people move away from



*"As much as 60% of our revenue comes from our physical stores. Of that, grooming services account for about 15%."*

joint families to nuclear family set-ups. That said, our Tier-2 and Tier-3 experiments have shown depth, and there's exciting potential in these markets. We are taking a slow approach, but I believe there are great opportunities.

**How does consumer behavior differ across the tiers?**

The main difference is awareness. In Tier-1 cities, pet owners are more informed and exposed to more content. In Tier-2 and Tier-3 cities, some people may still wonder why their dog needs a toy, because they've never considered it before.

Lifestyle differences also play a role. In smaller cities, homes tend to be larger, with more space for pets, whereas in Tier-1 cities, increasing urbanization means more apartment living. However, demand for pet products exists across all regions.

**What about expansion beyond India? You already have a presence in Singapore. Can you share your strategy for growing internationally?**

We wanted to test our product market fit in a global setting, so Singapore made sense – it's close by and has higher purchasing power. We now have 2 stores there and are about to open a third. The response has been great, and we see strong demand. Next, we're looking at the Middle East and some neighboring countries where we see opportunities.

We want to ensure we expand strategically without diluting our focus. Finding the right partners will be key. Our ambition is to take our products worldwide. We put immense effort into R&D, and we believe our edibles and lifestyle products are world-class. We want pets everywhere to benefit from them. ♦

*\*Indian cities are classified based on population and economic factors. Larger cities, such as Mumbai and Delhi, are Tier-1 (100,000 people or more). Less populated cities and towns are classified as Tier-2 (50,000-100,000) and Tier-3 (20,000-50,000).*



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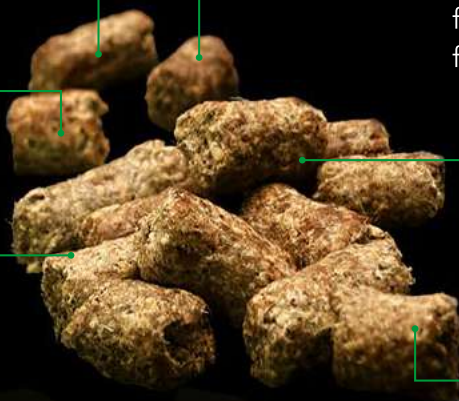
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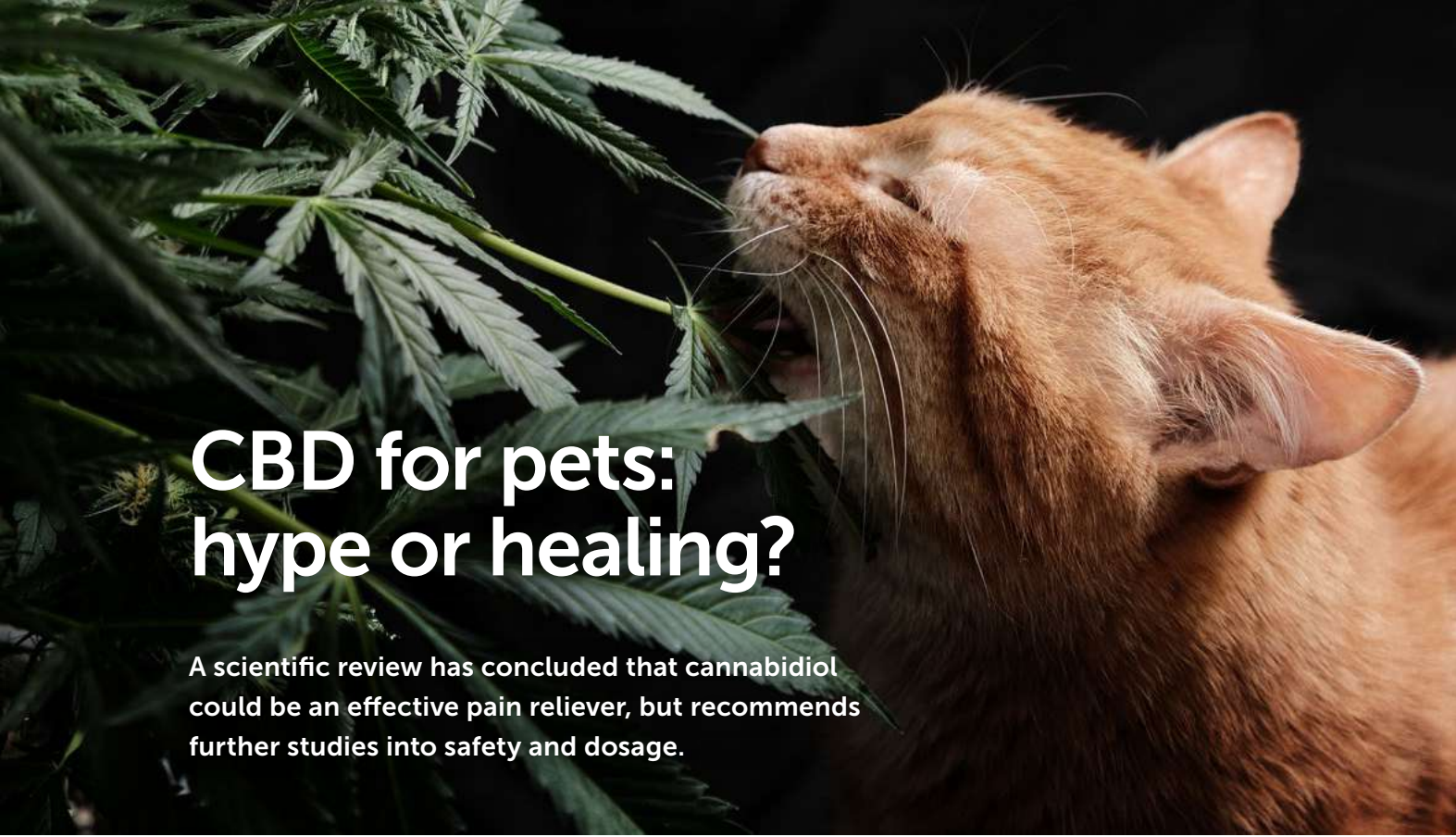
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### SCIENTIST FORMULATED





# CBD for pets: hype or healing?

**A scientific review has concluded that cannabidiol could be an effective pain reliever, but recommends further studies into safety and dosage.**



**Sarah-Jane Molier**  
*Veterinary Surgeon*

The use of cannabidiol (CBD) in both humans and pets over the past decade or so has received much publicity and promotion, most of which has been consumer-driven. This in turn has led to increasing research on the benefits and safety of CBD oil.

## How does CBD work?

Cannabinoids have reportedly been used for thousands of years in traditional medicine in the treatment of all manner of ailments. Cannabis plants contain many active compounds, including cannabidiol (CBD) and tetrahydrocannabinol (THC).

THC is the psychoactive component, responsible for the 'high' that attracts recreational drug users. Importantly, THC is toxic to pets. In contrast, CBD does not possess psychoactive properties.

The endocannabinoid system involves neurotransmitters that bind to cannabinoid receptors expressed in the brain and nervous system. Endocannabinoids play a homeostatic role in the body.

CBD is a plant-derived cannabinoid, which can act on the same receptors. CBD acts on the immune system, possibly causing immune-modulation and reducing both the sensation and perception of pain.

## Potential uses for chronic pain

Many potential uses of CBD in pets have been hypothesized, including in the treatment of cancer, irritable bowel syndrome, atopy, epilepsy, immune-mediated conditions, anxiety and chronic gingivostomatitis in cats. However, recent research in the veterinary world has focused on chronic pain.

Chronic pain is one of the main causes of reduced quality of life in pets, especially geriatrics. Veterinarians often reach for 'multi-modal' analgesia, and it is thought that CBD oil could play an important role in managing chronic pain, especially pain associated with osteoarthritis (OA), in the future.

A systematic review was published in 2024 in the scientific journal *Pharmaceuticals*, with the aim of updating and gathering clinical and preclinical evidence on CBD in the treatment of pain. The review analyzed 40 studies, which had to meet strict inclusion criteria.

[▶ SEE NEXT PAGE](#)



The review only included studies looking at CBD (without THC) as a monotherapy pain treatment, and covered both clinical and preclinical trials. This review concluded that CBD could be both effective and safe in reducing pain, via both pain relief and anti-inflammatory actions.

Consequently, CBD shows future potential in the treatment of OA and chronic pain in pets. However, while research so far seems promising, the authors note that clinical evidence is still limited, so more studies are needed.

### Promising results

Further research has already been published, including a 2025 paper looking at a specific cannabis-based nutritional supplement. The study looked at the effects of a cannabinoid-based phytocomplex (Pain Relief™) on chronic pain in osteoarthritic dogs.

The supplement is an oil-based formulation containing cannabidiol (15%) and cannabigerol (15%), myrcene (0.3%) and devil's claw (1%) alcoholic extract, diluted in fractionated coconut oil. 21 adult cross breed dogs suffering with chronic pain due to severe OA were split into placebo and treatment groups. The treatment group received the nutritional supplement for 30 days.

***A 2024 study looking at the safety of CBD products concluded that the compound was well tolerated by healthy dogs.***

According to the study, the treatment group showed decreased scores on the Helsinki Chronic Pain Index, a reduction in reactive oxygen metabolites, reduced interleukin-6 levels and increased interleukin-10 levels. No side effects were noted.

Although limited conclusions can be drawn (since the study was very small scale, over a short time period, with several ingredients possibly working synergistically), the results are promising. The study concludes a potential pain relief and anti-inflammatory benefit of this supplement for OA in dogs, improving quality of life.

### Safety considerations

To date, there has been limited data evaluating the safety of CBD when used alongside other chronic pain medications. A 2024 study evaluated the effect of CBD in dogs with mobility disorders, alongside and without non-steroidal anti-inflammatory drugs (NSAIDs).

The results suggested a potential benefit of CBD in improving mobility. There were, however, greater elevations of alkaline phosphatase (ALP, a liver enzyme used to assess liver health, among other things) when CBD was given alongside NSAIDs.

While the authors report this likely did not correlate to liver damage, they note that further research is still needed to evaluate the safety of CBD products when given alongside long-term medications.

Recent studies show encouraging results as to the safety of CBD oil, especially in dogs. A 2024 study published in *Frontiers* looking at the safety of CBD products in healthy dogs concluded (from their study, other published studies and data from post-market surveillance) that the compound was well tolerated by healthy dogs (at a dose of 5 mg/kg/day). This is promising in terms of the safety profile, but more research is needed both to support this and to determine the optimum dose and route of administration.

### Obstacles to adoption

One obvious and quite significant hurdle to the global market is legality and red tape, which varies greatly across continents. For example, in the UK, the Veterinary Medicines Directorate (VMD) issued



*One obvious and quite significant hurdle to the global market is legality and red tape, which varies greatly across continents.*

a statement in 2018 that said: "We consider that veterinary products containing cannabidiol (CBD) are veterinary medicines and should be regulated as such. CBD products for use in animals, therefore, now require a marketing authorization before they can be sold or supplied in the UK."

CBD is a lipophilic compound, with limited absorption into the bloodstream. The bioavailability of CBD oil is poor and variable, and oral bioavailability in dogs is thought to be less than 20%, likely due to first pass metabolism. So, despite CBD's therapeutic potential, its pharmacokinetic profile needs further research before it can be safely and effectively used for pets. There is currently no known safe or optimal dose, nor route of administration.

A number of studies have looked at how we could increase the oral bioavailability in dogs. Current research suggests that water-soluble forms have greater bioavailability than oil-based forms. Co-consumption with food may also affect absorption (both rate and extent). Recent findings suggest that CBD in a nano-emulsion can achieve rapid absorption, but more research is needed here.

The cannabis plant also concentrates contaminants such as pesticides and heavy metals. Production of CBD products must therefore ensure these contaminants are removed. THC must also be removed, for both legal and safety reasons.

### Strong area of growth

A 2023 survey of 1,238 pet owners (mainly in the US) reported that 28.8% of respondents either give or had given CBD to their pets. The majority of these were to dogs (75.8%), but some owners reported having given them to their cat. Anxiety and stress were the main reason for giving CBD products (67.4%), followed by joint pain (23%). 51.4% of respondents reported that they would be interested in giving their pet a CBD product.

CBD products are already growing on the global market, and this trend is only set to increase. ♦

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# Regulatory uncertainty hampers potential of CBD use in pet products

Vets and owners are increasingly minded to explore natural options for supporting pet health, but varying legislation in different territories makes marketing cannabis-derived products a particular challenge.



**Dario Sabaghi**  
*Contributor*  
*PETS International*

Although the US and Europe are the biggest markets for cannabidiol (CBD) for pets, in neither region have CBD products been authorized for medical use in animals and there are strict and, in some cases, confusing rules governing the uses of this ingredient.

## The picture across the US

While the US market allows a wide range of CBD products, none are approved by the Food and Drug Administration (FDA) for veterinary use. Despite these restrictions, CBD products for pets are widely available through major retailers including Whole Foods Market, Petco, Fresh Thyme Market, PetSmart and Walmart, as well as online platforms such as Chewy, which started selling CBD products for pets a few months ago.

One of the products on sale at Chewy is +PlusCBD, a brand marketed by consumer wellness company CV Sciences. Its CEO, Joseph Dowling, tells PETS International that the growing interest in CBD highlights a rising focus on addressing pet health issues.

To meet this demand, the company is emphasizing quality and working with major retailers like Chewy to expand availability. Its offerings now include calming chews as well as hip and joint supplements enriched with natural ingredients.

Beyond that, CV Sciences is investing in research and development to explore new areas such as dental and digestive health.

## Legalities in Europe and Asia

In Europe, CBD regulations are tighter and products are regulated as 'novel foods', requiring approval before they can be marketed – for whatever use. Companies can't sell CBD pet food or supplements, only products for topical use, such as creams or oils. European companies such as Formula Swiss and HEROSAN say that the unclear regulations make it hard for the CBD pet product market to grow, limiting consumers' access to new products.

The Asian market for CBD pet products is still in its early stages, with limited availability. In 2023, Hong Kong took a tough stance, banning CBD products – including those for pets – which led to businesses in the CBD pet space shutting down.



In China, CBD was banned in cosmetics in 2021, though production for export is still allowed. While awareness is growing in countries such as Thailand, where CBD is legal for medicinal use under certain regulations, strict cannabis laws and cultural attitudes are slowing broader acceptance across Asia.

### Navigating innovation

US veterinarian Dr. Gary Richter says that as more professionals accept and understand the science behind CBD, its use is likely to increase, and he explains that “the 2 biggest factors driving owners to look for CBD products for their pets are pain – specifically arthritis-related pain – and anxiety”.

Product innovation has also expanded to meet consumer needs, with the market now offering chews, biscuits and dental gels alongside traditional tinctures and oils.

New consumer needs include products for the digestive and dental health of pets. CV Sciences, for example, offers calming chews with CBD, chamomile and L-theanine for anxiety, while HEROSAN uses combination products where CBD complements other active ingredients to provide holistic solutions that promote overall pet health.

### Restricted to topical use in the EU

While US businesses are offering CBD pet treats, chews and similar products, regulatory hurdles in Europe prevent the introduction of these product formats. Formula Swiss explains that CBD-infused biscuits and snacks for pets are not allowed in most EU countries, as CBD for pets is classified as a novel food requiring safety evaluation.

The company’s CBD oils, for topical use only, comply with EU regulations that restrict oral CBD consumption for pets. This creates a gap between market demand and supply, as customers seek edibles but companies are unable to legally sell them.

***In the EU there is a gap between market demand and supply, as customers seek edibles for their pets but companies are unable to legally sell them.***

“Ideally, customers would love to have biscuits or sticks with CBD inside, so they could feed their dog a snack instead of dosing on the oil. However, the official use of CBD in Europe is topical only,” Robin Roy Krigslund-Hansen, CEO of Formula Swiss, tells PETS International.

### No FDA approval for pet CBD

In the US, the 2018 Farm Act legalized hemp-derived CBD, but the FDA has not approved cannabis for any use in animals. Therefore, brands avoid making explicit health claims to circumvent being classified as pharmaceuticals, which would complicate their marketing. Furthermore, misleading labels – particularly those overstating CBD content or containing unsafe levels of THC – may pose risks to pets and damage consumer trust.

### Inconsistency in European countries

HEROSAN describes the regulatory landscape in Europe as a “jungle”, with rules varying between countries. This inconsistency has created confusion for manufacturers, retailers and consumers alike. However, Markus Griesangerl, Head of Marketing at HEROSAN, says the company is collaborating closely with governments, associations, veterinarians, scientists and educational institutions across the continent in order to “create clarity and a legally secure framework for everyone – producers, retailers and, above all, users”.

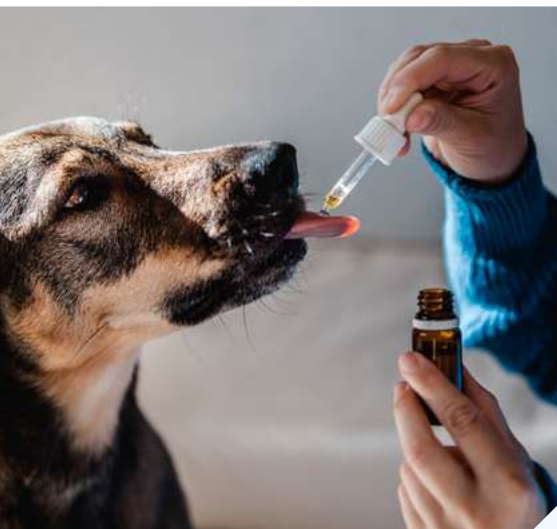
### Challenging the stigma

Formula Swiss explains that the stigma surrounding cannabis further exacerbates this issue, with authorities and agencies often seizing products despite their legal classification. The company is, for example, challenging the UK’s Veterinary Medicines Directorate, which seized its products even though these products were registered for pets’ topical use and not for veterinary medicine.

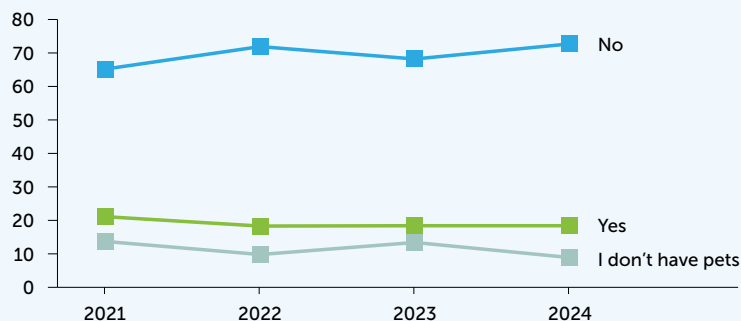
“It frustrates me that there is this stigma that cannabis is dangerous,” says Krigslund-Hansen. “Hemp has been around forever and is a natural crop with a lot of benefits, but many people still associate it with drugs.”

### Need for substantial trials

The stigma and legality surrounding cannabis also affect investment and research, according to Alex Khourdaji, Senior Analyst at Prohibition ► [SEE NEXT PAGE](#)



## "Do you give CBD to your pet?" (US, % of CBD users)



Source: Brightfield Group, data gathered in Q4 each year

Partners, a cannabis-focused B2B analytics platform, who says that the absence of rigorous clinical trials and transparent product testing undermines credibility. As products evolve toward pharmaceutical-grade formats, true innovation remains limited. Market expansion is closely tied to clinical research and the easing of restrictions.

"The main issue is the lack of research into CBD for pets. Without larger-scale clinical trials, the industry cannot validate its claims or reassure consumers about safety and efficacy," he explains.

While small studies suggest CBD could benefit pets, the lack of large, peer-reviewed trials limits evidence-based claims. In this context, clearer regulations and eased cannabis restrictions could encourage more investment in research.

### Combating low-quality products

Consumer trust is key in the pet care market, but the growth of low-quality products has undermined confidence in CBD for pets. Both Formula Swiss and HEROSAN criticize 'trash products' – low-quality CBD items that don't meet proper standards.

From their point of view, many new CBD companies lack expertise and often source unreliable products, sometimes from places such as China. However, as the market matures, Griesangerl believes that "trash providers will increasingly be flushed out of the market because trust is the most important currency".

Industry leaders stress the importance of transparency and compliance. "The bigger challenge is to make sure products are accredited by organizations like the National Animal Supplement Council in the US," says Dowling. "This ensures adherence to quality and safety standards and allows the label to be placed on the product. Building consumer trust is important."

### Expansion expected across the US

Despite challenges, the CBD-for-pets market looks promising. In the US, growth is expected to continue as veterinarians recommend more CBD products and regulations improve.

Richter tells PETS International that both pet owners and veterinarians are becoming increasingly interested in CBD for pets and believes vets will start recommending these products more often.

"Veterinarians are also going to begin selling these products directly, which will contribute to market growth," he says. Additionally, if cannabis is reclassified from Schedule I to Schedule III of the US Controlled Substances Act, pharma companies may enter the market, leading to a rise in CBD-based pharmaceutical products.

Furthermore, according to Dowling, legislative reforms for cannabis and hemp in the US could drive greater investment in research. This is because companies will need robust evidence to support claims about the effectiveness of CBD, THC or their combinations



*While small studies suggest CBD could benefit pets, the lack of large, peer-reviewed trials limits evidence-based claims.*

– potentially with other ingredients – in addressing specific health needs for both animals and humans.

While the CBD pet market faces many challenges in the areas of regulation, quality and misinformation, it also possesses strong growth potential. Development is driven by the demand for natural pet health solutions and continuous innovation. To thrive, the industry should emphasize transparency, research, education and collaboration.

In the US, investment in the CBD market could grow if cannabis is reclassified alongside broader reforms in the hemp industry. While these reforms mainly focus on human consumption, they could also open the door for companies to gain FDA approval for CBD products for pets.

### Potential progress in Europe

The European market may see consolidation and growth, but not at the pace of previous years, with little innovation expected soon. Growth will depend on regulatory alignment – HEROSAN believes that standardizing laws across the EU would reduce confusion and drive innovation and advances in research, which could lead to new opportunities. Formula Swiss emphasizes the need for companies to collaborate in advocating for policy changes and pressing for regulatory reform.

The European Industrial Hemp Association, a body which lobbies EU institutions on behalf of industrial hemp producers, announced in 2020 its plan to invest up to €3.5 million (\$3.7M) to fund critical and unprecedented toxicological studies on CBD and THC.

Richter highlights the importance of educating both veterinarians and pet owners about CBD, as misinformation and stigma continue to be major hurdles. ♦

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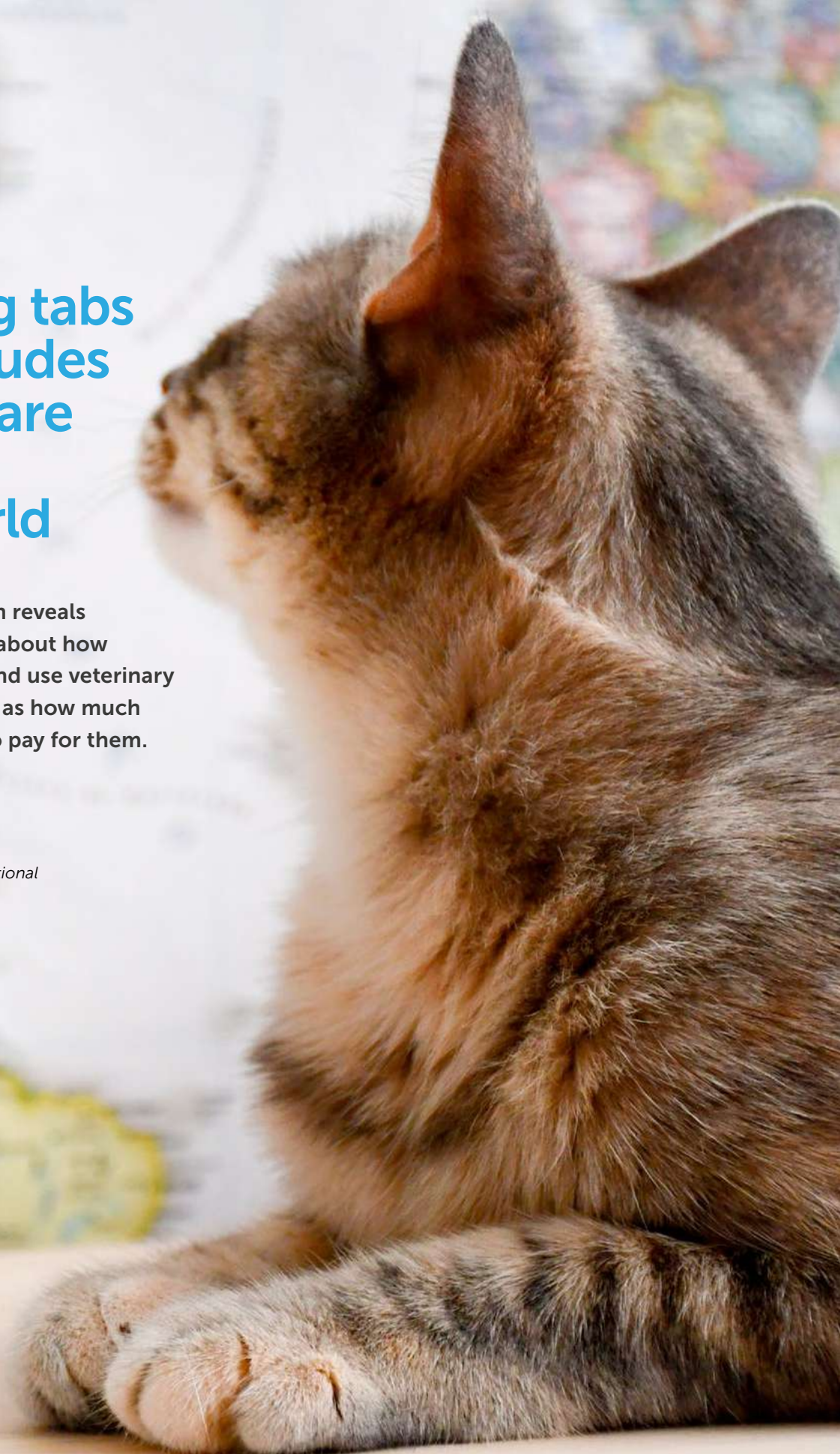


# Keeping tabs on attitudes to vet care around the world

Exclusive research reveals valuable insights about how consumers find and use veterinary services – as well as how much they are willing to pay for them.



**Paula Flores**  
*Contributor*  
*PETS International*





A recent survey by PETS International, in collaboration with Yummypets, provides an interesting snapshot of the pet consumer's experience of veterinary services. More than 1,200 pet parents responded – in the US, Canada, the UK, France, Mexico and Brazil. In 4 of these countries, similar research was conducted in 2023.

### US: frequent visits and increasingly insured

Americans make the most trips to the vet, with just 1 in 10 (11%) doing so less than once a year, a similar proportion to the previous survey. Price does remain a concern – 7 out of 10 owners find vet care expensive.

But more than half of those surveyed (52%) maintained their expenditure levels last year, and 26% plan to increase spending in 2025. 67% of US pet parents spent between \$100 (€97) and \$500 (€483) in 2024.

Interestingly, pet owners in the US are among the most dependent on online reviews and forums when choosing a vet. Nearly a quarter (24%) rely on these channels, the highest across all markets. Also, relying on friends' recommendations grew to 38%, up from 28% in the last survey.

One notable shift from earlier results relates to pet insurance. Whereas last time only 20% of respondents

said they had health insurance, this coverage has gone up to 35% in 2025, possibly due to a rising awareness of healthcare costs.

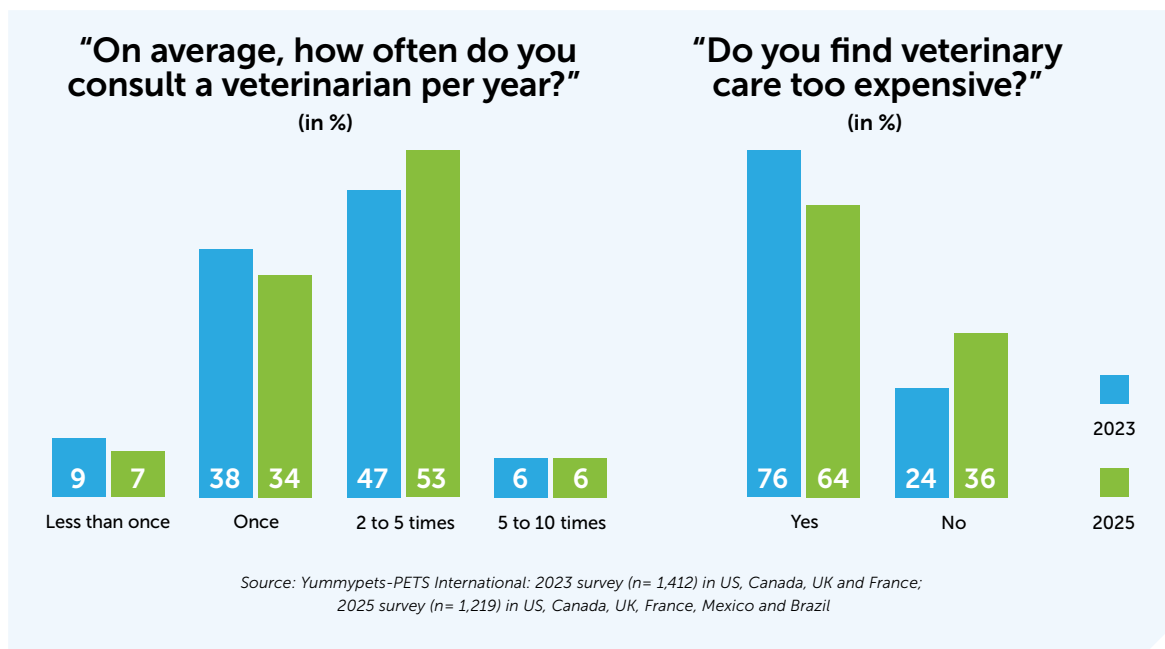
Reflecting the state of digital advancements, Americans have a balanced approach toward virtual vet consultations. More than a quarter of those surveyed (27%) said that it depends on the nature of the visit. This represents the most flexible attitude of pet owners in the 6 markets.

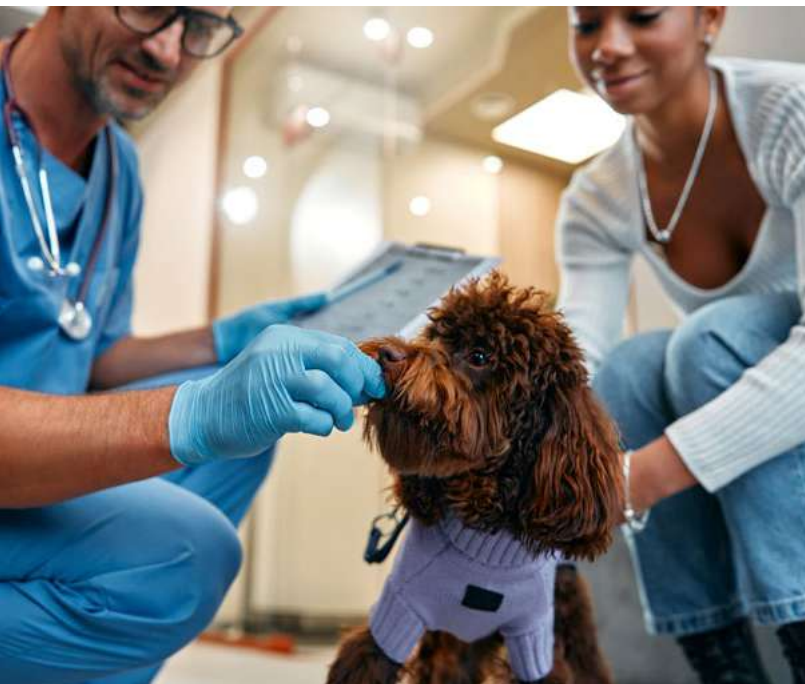
### Canada: high spending but rising costs

Canadian pet parents are among the biggest spenders on veterinary care. A striking 22% report spending between \$500 (€483) and \$1,000 (€965) annually, and 9% over \$1,000 (€965). This pattern is very similar to the findings in 2023, making Canada one of the most financially committed countries when it comes to pet health. Yet 76% do find vet care too expensive.

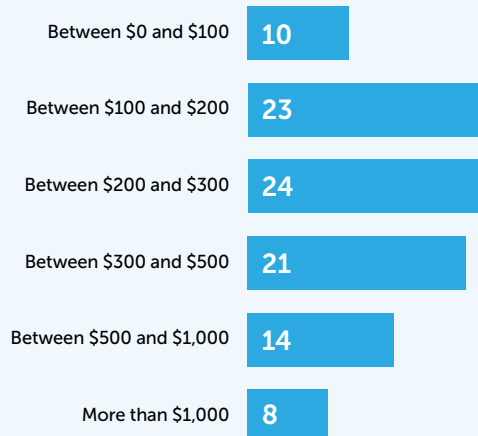
The number of trips to the vet is also increasing. Almost half (48%) of Canadian pet owners now take their pets to see a vet annually, a sharp rise from just 30% of the respondents in the country 2 years ago. Fewer pet parents (40%) report visits only every 2-5 years, down from 60% in the previous survey.

[▶ SEE NEXT PAGE](#)





## Yearly expenditure on vet care (% of pet parents)



Source: Yummypets-PETS International January 2025 (n= 1,219)  
in US, Canada, UK, France, Mexico and Brazil

### UK: changes on the horizon

Over the past year, UK vets have been placed in the hot seat, as the Competition and Markets Authority (CMA) launched an investigation into the pricing and competition landscape, due to concerns about mounting costs (see p.30). 84% of UK pet owners agree with this government action.

Despite this, 7 out of 10 (69%) of the respondents in the UK are satisfied with the level of transparency regarding the cost of veterinary consultations and services provided by vet clinics. But there is little doubt that vet costs are on the rise.

In the previous survey, 66% of UK respondents reported spending up to \$200 (€193). However, this figure has dropped to just 37% in 2025. Almost a quarter (24%) of these pet owners now spend between \$300 (€290) and \$500 (€483). Encouragingly, 65% plan to maintain their expenditure levels in the coming year.

***Whereas in 2023 only 20% of US respondents said they had health insurance, this has gone up to 35% in 2025, possibly due to healthcare costs.***

### France: local and low spend

French pet parents seem to prioritize convenience, with 65% of them choosing their vet clinic based on proximity. This is far above the average of 42% in the survey's findings and represents an increase to the 54% of French owners reporting this reason last time.

Pet owners in France also pay great attention to price. Nearly half of the respondents (49%) said they spent no more than \$200 (€193) on vet care last year, making them the most budget-conscious group, although reflecting a decline on the previously reported 60%.

Despite lower spending, these pet parents maintain a high level of trust in their vets. An overwhelming 94% believe their veterinarians provide enough time and care during visits.

When it comes to virtual consultations for their pets, the French are the most skeptical. They are the least likely to use online vet consultations, with almost half of them (49%) saying they've never used online vet services and have no intention of doing so. This makes them the least receptive to digital pet healthcare solutions, even if it represents an improvement on previous findings (67%).

***Mexico also stands out for its level of trust in vet professionals – 48% of the respondents give it a 10 out of 10.***

### **Brazil: preferring in-person to digital**

Perhaps surprisingly, Brazilian pet owners are among the biggest spenders on veterinary care. A significant 20% reported annual expenditure between \$500 (€483) and \$1,000 (€965), placing Brazilian owners just behind Canadians. Even more notably, 14% of the pet parents in Brazil spend over \$1,000 (€965) per year – the highest percentage across all the markets surveyed.

Some 21% of the respondents also said that their vet expenditure had significantly increased over the last 12 months – the highest globally, with nearly half (47%) saying it had increased slightly. This might be related to Brazil having the largest proportion of pet owners who visit their vet 5-10 times a year (12%), far exceeding the average of 6% in the markets surveyed.

Brazilian pet owners also rely heavily on veterinary advice. More than three quarters of them (76%) expect their vet to provide dietary guidance, and 47% consider behavioral training recommendations essential. This is the highest across all 6 markets.

There are mixed responses in Brazil on the subject of virtual consultations. While 28% of the respondents have already tried and liked them, another 19% have tested this kind of service but were dissatisfied. This suggests that while digital healthcare is gaining ground, in-person interactions and the 'human touch' remain highly valued.

### **Mexico: high level of trust**

Mexican pet parents visit the vet less frequently than their counterparts in other countries, with 67% going just once in 2-5 years. Yet, they are the only country where respondents do not feel that vet care is too expensive (75%).

Almost half (46%) of the Mexican pet owners spend between \$100 (€97) and \$300 (€290) annually, and 21% spend between \$300 (€290) and \$500 (€483). But some 3 out of 10 owners intend to increase this expenditure slightly over the next 12 months.

Interestingly, Mexico currently has the lowest levels of pet insurance (17%), but demand is definitely on the rise. A significant 46% of pet parents are considering taking out insurance for their pet's healthcare, suggesting there is some potential for insurance providers in this market.

Mexico also stands out for its level of trust in vet professionals – 48% of the respondents give it a 10 out of 10. Satisfaction also rates highly with regard to vet pricing transparency. A substantial 36% of pet parents are very satisfied with the level of cost detail provided, the highest among all countries surveyed.

### **Europe vs the Americas**

It seems clear that, no matter where they are, pet parents deeply value the healthcare given to their pets. Owners want the best care for their furry friends, but spending habits differ significantly. Trust levels in vet professionals are high across all markets in the survey, and most pet owners feel they are given enough information before treatment or surgery take place.

Although most owners think that vet costs are expensive, in Europe – especially France – pet parents tend to be more cost-conscious, with the majority spending less than \$200 (€193) per year. By contrast, US, Canadian and Brazilian pet owners are more willing to spend considerably on pet healthcare, with a large percentage paying over \$1,000 (€965) annually.

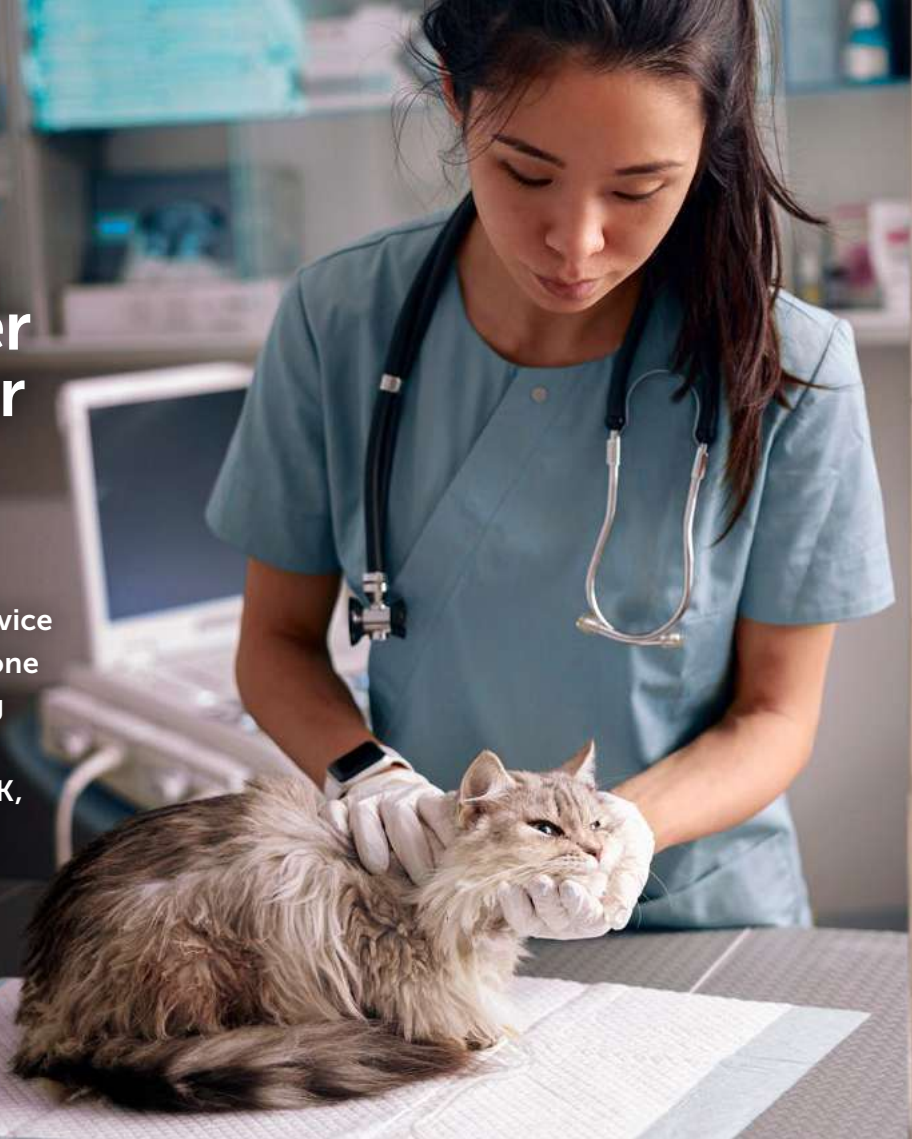
In Brazil, 21% of the pet owners reported a significant increase in vet care expenses, compared to just 9% in Mexico. Nearly half (47%) of the Brazilian respondents also reported a slight increase in costs, but it is pet parents in the US whose expenditure increased the least (22%). ♦





# How to ensure a fairer vet market for consumers

What factors are affecting competition in veterinary service provision and what can be done to create a more level playing field? Following a formal market investigation in the UK, the potential remedies could have wider implications.



**Dr. Saskia King**  
*Partner – Competition & EU Law  
Bird & Bird*



**Graeme Payne**  
*Partner and Head of Retail & Consumer  
Bird & Bird*

The UK veterinary market has seen significant changes over the past few years, ranging from increased pet ownership to consolidation. In 2024, the UK Competition and Markets Authority (CMA) launched a full market investigation to ensure that this market allows for strong competition that provides good outcomes for pets and pet owners alike.

## Market-wide investigation

An initial market review by the CMA found a lack of transparency and limited accessibility for consumers

to basic information such as prices lists and prescription costs. This led to a formal UK market investigation into the supply of veterinary services for household pets in May 2024.

Whereas many similar European authorities are generally restricted to investigating individual companies, the CMA has the power to conduct whole-market investigations. This allows for an in-depth assessment of whether there is an “adverse effect on competition” within a given market.

To address competition issues at a market-wide level, the CMA can take direct remedial action and impose remedies on a whole sector.

These can take the form of legally binding undertakings and orders, or non-binding recommendations to the government or relevant bodies.

***Responses made it clear that concerns within the veterinary sector are widespread and have sparked considerable public interest.***

The CMA received 56,000 responses to its initial review, and experienced extensive engagement – from parties ranging from large vet practices to veterinary representative bodies – in response to its Issues Statement and working papers. This made it clear that concerns within the veterinary sector are widespread and have sparked considerable public interest.

**Remedies to improve competition**

If the CMA determines an adverse effect on competition within the veterinary sector, it has several potential remedies at its disposal. These remedies can be either behavioral (targeting practices and conduct) or structural (requiring changes to the market structure itself). Examples include:

**Mandating providing information to consumers**

With 80% of vets having no pricing information on their websites, one major concern in the veterinary sector is the lack of pricing information available to consumers. To address this issue, the CMA may require practices to publish clear, transparent pricing for consultations, medications and other services separately, allowing pet owners to make more informed decisions.

This remedy mirrors similar actions taken by the CMA in the funeral sector in 2018, where businesses were required to publish headline and individual prices for funerals and component services both online and in their premises.

Additionally, to promote competition, the CMA may mandate veterinary practices to send out annual 'wake-up' letters to registered customers, encouraging them to reconsider their choice of 'first-opinion practice' for the day-to-day care of their pets.

**Requiring maximum prices/fees**

If current prices are found to be well in excess of costs, the CMA may seek to realign prices with cost plus a reasonable return. This could include imposing maximum prices for prescription fees, or maximum prices or mark-ups for other services.

**Imposing structural remedies**

If the CMA finds that the consolidation of veterinary practices under larger corporate groups is negatively impacting consumers due to fewer choices and higher prices, they may order the divestment of certain businesses or parts of businesses. Using targeted structural remedies in this way can open the market and lower barriers to entry.

The UK's competition regulator certainly has form in a merger context. For example, in 2022, the acquisition of Goddard Veterinary Group by VetPartners was only cleared subject to the divestment of 8 sites in local areas where the CMA had identified competition concerns.

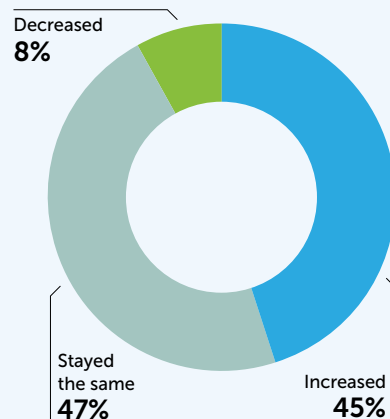
**Suggesting changes to the regulatory framework**

The CMA has previously suggested the possibility of using its powers to incorporate remedies into the Royal College of Veterinary Surgeons (RCVS) Code of Professional Conduct and/or associated guidance.

The goal of this is to ensure that the UK's veterinary profession evolves in a way that supports both consumers and professionals in a competitive and fair market.

[▶ SEE NEXT PAGE](#)

**Spending on vet care in the past 12 months**  
(% of UK pet parents)



Source: Yummypets-PETS International, January 2025 (n=202)



### Broader international outcomes

Concerns about competition in the veterinary sector are not confined to the UK. For instance, a growing presence of non-veterinarian-owned practices in the US and also in Ireland is sparking concern that clinical standards and the public interest may be compromised in the pursuit of profits.

Meanwhile, in France, action taken in 2023 resulted in 4 large corporate practices being forced to deregister on the basis that their model undermined the professional independence of vets. Among the companies impacted was IVC Evidensia, Europe's largest corporate veterinary company with operations across 20 countries, including the UK where it had 400 practices.

Increased private equity investment in the veterinary industry is also driving the presence of large corporate groups, meaning many practices may not be nationally owned. Despite the market investigation tool being specific to the UK, if the CMA's market investigation finds broad sector issues, it may encourage authorities in other countries to use their powers to investigate specific parties, prompting wider change in the global veterinary industry.

### Resetting the balance

By highlighting the challenges faced by vets and pet owners alike, the CMA investigation underlines the conflict between prioritizing pets or profits.

The authority's provisional decision is expected by May/June this year. If competition concerns are found, it is likely that more than one type of remedy will be required due to the diversity of the issues being investigated. These could have a significant impact on the veterinary sector in the UK and could potentially also serve as a model for other countries facing similar challenges. ♦

### CMA's areas of concern about the UK veterinary market

- Consumers lack information for decision-making.
- A lack of choice in local markets, driven in part by sector consolidation, may be leading to weak competition in certain areas.
- Pet owners may be overpaying for medicines or prescriptions.
- Vet businesses have the incentive and ability to limit consumer choice when providing treatment or recommending related services.
- The regulatory framework is outdated and operates in a manner that does not facilitate a well-functioning market.





**MAST ITALY**

## Customizable pet treats from Italy

**Mast's pet treats can be tailored to customers' needs, from ingredients to packaging. Dive into the possibilities that set the company apart.**

### Private label production with a focus on quality

Founded in 2014, Mast has grown into a key private label producer for the pet industry. Based in Italy, the company collaborates with major retailers and distributors, offering pet biscuits and snacks with a focus on quality, automation and customization. Now, Mast is looking to expand beyond Italy, bringing its expertise to international markets.

### High-quality ingredients, no unnecessary additives

Mast's products are characterized by a carefully selected list of ingredients. Dog biscuits are available in meat- and vegetable-based recipes, with modifiable options including fruit, vegetables, herbs and flowers. Snacks for dogs and cats contain only a few essential ingredients: animal proteins, soft wheat flour, vegetable oil, corn starch and water. Protein contents range from 4% to over 90%, and the company uses a variety of protein sources, including chicken, beef, lamb, duck, rabbit, deer, wild boar, pork, tuna, salmon and shrimp.

Functional ingredients such as vitamin and mineral complexes, inulin, taurine and chondroitin can be added to meet specific dietary needs. The things Mast does not include in its products are just as important; none of its recipes contain added salt, sugars, preservatives or chemical additives.

### Customization in shape, formulation and packaging

Thanks to the extensive customization options Mast offers, clients can choose specific shapes, recipes and ingredient combinations. The company's automated production process enables the creation of a wide range of snack shapes, including small and medium-sized bones and cubes. Custom molds can also be developed to match client specifications.

In addition to tailored product formulations, Mast provides complete packaging solutions. Pet biscuits and snacks can be packed in bags ranging from 5 g to 10 kg, with additional options for header cards and boxed packaging. The company's in-house technical and

graphic team supports clients through all stages of design, from product development to branding and legal labeling compliance.

### Expanding beyond Italy

Mast has built strong relationships with retailers and distributors in Italy and is currently present in over 1,000 retail locations. Now looking to expand internationally, the company will continue to focus on delivering high-quality private label pet treats with flexible customization options. By working closely with clients, Mast ensures that each product meets both market demands and brand requirements. ♦

**Mast s.r.l.**

*[mastpetcookies.com](http://mastpetcookies.com)*





## GlobalPETS Forum 2025

# Talking tech, risk-taking and... cats

In a wide-ranging event, pet industry leaders discussed the importance of valuing innovation, harnessing technology and how to best to thrive in the face of a changing consumer landscape.



**Barbora Jiřincová**

*Contributor*

*PETS International*

At this year's GlobalPETS Forum in Prague from 22-24 January, business leaders and experts came together to discuss the challenges, opportunities and advances shaping the pet industry. Against a backdrop of inflation, changing consumer habits and increasing technological sophistication, the forum offered invaluable insights for navigating a rapidly evolving market.

### Brave decisions in a time of change

Marc Hogan, comedian and psychologist, addressed the audience in his talk 'Funny business' with a compelling invitation to silence self-doubt and embrace bold decisions. "Your inner editor has already decided that you fail before you even start. Tell it to go to hell and do your job," he urged, challenging attendees to push beyond their comfort zones.

This call to bravery resonated with the event's mood, especially after Sam Farnfield, Director at PwC Strategy&, speaking on the same day, talked about investors' priorities during his fireside chat on mergers and acquisitions (M&A) and highlighted the qualities investors prioritize.

"Who knows what is going to happen in 2025? They want to know if this business is adaptable enough to survive whatever comes," he said, emphasizing the need for resilience and flexibility. He noted that the pet





industry has fared better than others during economic uncertainty, thanks to strong consumer loyalty and the 'essential' nature of pet products.

Inflation was another pressing issue. Mike Davies, Analytics Leader at NielsenIQ, provided a data-driven overview in his session on the state of the industry: "1 in 4 products is now sold on promotion, reflecting the shift in consumer spending habits."

Inflation has driven customers to prioritize essentials and buy smaller packs as well as take advantage of loyalty programs, bulk discounts and promotions. Pet businesses must adjust to these trends to survive.

### Making technology serve a purpose

Technology is reshaping the pet industry, offering new ways to meet consumer expectations and streamline operations. Tom Palmaerts, trendwatcher at Trendwolves – a research and marketing company with a focus on youth culture – spoke about the growing role of artificial intelligence (AI) as he discussed future consumer trends.

"AI will help us understand animals better," he claimed, predicting further advances in diagnostics, wearable devices and AI-driven purchase automation. Davies supported this argument with data suggesting that 38% of consumers already use wearable devices, while 44% trust AI recommendations even when concerning their pet's health.

Ellinor Persdotter Nilsson, CCO at Nordic pet giant Musti Group, showcased how data analytics have transformed the company's approach.

"We use advanced analytics and personalized programs based on pet age and behavior," she explained. Musti's loyalty program integrates in-store interactions with digital platforms, creating seamless, tailored experiences that drive customer retention.

According to Davies, products like smart litter boxes and AI-powered pet feeders reflect growing consumer demands for convenience and health monitoring. Palmaerts also highlighted generational differences, with Gen Alpha viewing technology as normal, while Gen Z often feel overwhelmed by its rapid pace.



### Analyzing behavior of different generations

Many participants agreed that generational shifts are forcing companies to rethink their marketing strategies. Palmaerts described Millennials as decision-fatigued shoppers who prefer curated, simplified options. "Millennials need fewer choices, or they'll run away," he said. Gen Z, on the other hand, he believes value experimentation and personalization – but their loyalty is harder to secure.

Unlike Palmaerts, NielsenIQ's Davies recommended that pet businesses focus on older generations. This group, typically aged 45-79, has greater financial freedom and is less driven by price, focusing instead on quality and personalized service. A significant number of pet households fall within this category.

This group manifests different shopping behavior. In contrast to their younger counterparts, they prefer shopping in physical stores, viewing the experience as more than just a transaction. For them, a trip to the pet store is an outing often tied to their lifestyle of visiting malls and engaging with people.

### Marketing and branding perspectives

Claire Gavin, Director at Claire Gavin Innovations, stressed the importance of emotional connections in marketing in her session on 'The recipe to successful brands'. "Branding is the art of differentiation," she said.

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Gavin cited an example where understanding feline hunting instincts had led to highly successful cat toys that resonated with pets and their owners. Gavin also noted that storytelling helps brands stand out and further explained how she believes marketing is about seeing the product from the customer's point of view.

Her story of a dog food rebrand showed a transformation from a general vet-approved dog kibble into a breed and age-specific food brand that customers trust precisely because it matches their specific dog's needs.

In another example, Gavin discussed the importance of package design and having a strategy when deciding which information goes on the front and which goes on the back of the package.

Online marketing opportunities were also discussed, as platforms such as TikTok and Instagram have become essential for engaging younger audiences and even for direct shopping.

***With a session devoted to the subject of 'cat market opportunities', several GPF speakers identified the segment as a significant growth area.***

On the second day, when tackling the subject of 'Navigating marketplaces & DTC', Sanyam Mahajan, Senior Solutions Business Manager at web analytics specialist SimilarWeb, emphasized the importance of these platforms: "TikTok and Instagram will be critical platforms for engaging younger consumers." He recommended creating content that effectively blends education and entertainment to reach niche audiences.

### **Retailers: adapting to new realities**

Retailers face growing competition as consumers feel their budgets tightening and pet businesses must rethink strategies to stay relevant. Torsten Toeller, founder and chairman of Fressnapf, discussed the evolution of customer expectations.

"Customers expect more from us now, with omnichannel connections and smartphones in their hands," he said. He emphasized the importance of integrating online and offline channels to create a cohesive shopping experience.

In his talk on 'Building a pet empire in Eastern Europe', Dušan Plaček, CEO of Plaček Group, shared his company's efforts to blend e-commerce with physical retail. "50% of our orders are click and collect," he explained. Plaček's stores also offer services such as grooming and 24/7 self-service options, catering to customers seeking both convenience and in-person interaction.

Persdotter Nilsson highlighted Musti Group's data-driven approach. "We want our customers to feel supported throughout their pet's life journey," she said, describing how initiatives like puppy clubs and personalized content foster long-term loyalty.

### **Cats: untapped potential?**

With a session devoted to the subject of 'cat market opportunities', several speakers identified the segment as a significant growth area. Shannon Landry, Pet Brand Manager at market research agency Packaged Facts, noted that younger consumers increasingly choose cats for their affordability and ease of care. "Cat owners feel like second-class citizens, and that's a place for improvement," she said, urging businesses to address this underserved demographic.

Data highlighted the rise in cat ownership, with projected growth outpacing that of dogs. Cat owners spend primarily on food, as feeding is a crucial part of the bonding process between pet parent and cat.

Among non-food items, accessories are not a big priority, but owners spend significantly on litter, where customers' priorities lie in odor control and their cat's willingness to use a specific type of litter.

Sustainability is important to cat consumers, but with cats being notoriously picky, owners are often reluctant to switch brands. "The idea of a cat who stops using the litter box is terrifying to most cat owners," Landry noted.

### Expanding into new markets

In a session dedicated to the region's opportunities, Dr. Matthias Koch, founder of Singapore-focussed pet food importer Anibene, offered insights into Southeast Asia's emerging pet market. "One size does not fit all," he said, pointing to the region's cultural and economic diversity.

Cats dominate in Muslim-majority areas, while premiumization trends are more prominent in urban centers. With such a varied landscape, localization is key.

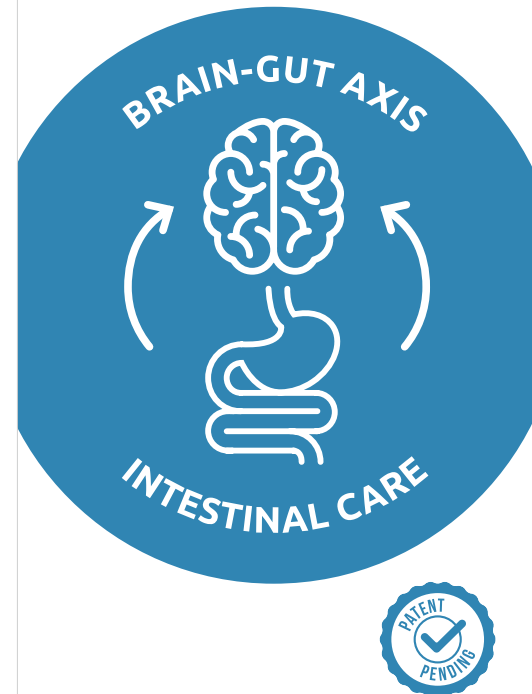
"In Asia, 8 out of 10 dogs are still fed with what is left from the table, and these people don't jump into feeding them with premium food," said Dr. Koch. Thus, the economy segment is experiencing the fastest growth in some regions.

"Digital content must feature local people, and everything must be localized," said Dr. Koch, explaining that successful expansion requires strong partnerships with local distributors who understand market nuances. Despite logistical and legal challenges, the region offers immense opportunities for innovative products and services tailored to its needs.

### Innovation is key to resilience

From AI-driven products to personalized marketing and the potential of the cat market, GlobalPETS Forum 2025 succeeded in providing a thought-provoking and useful platform for debate and the sharing of expertise.

Throughout was the recurring theme of the importance of continuing to innovate. As Plaček aptly put it: "You have to understand the needs of this age and then you'll see one huge opportunity. And once you see it, you have to be ready for the changes." ♦



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# Earth Rated scoops GlobalPETS Forum Award 2025

The Canadian manufacturer of responsibly crafted poop bags has been recognized for its innovation and positive contribution to the pet-owning community.







**Barbora Jiřincová**  
Contributor  
PETS International

Earth Rated was named winner of the GlobalPETS Forum Award 2025 at January's ceremony in Prague. The company, headquartered in Quebec, has been recognized for its high-quality products and potential to impact the future of the pet industry.

### Making a difference to the everyday

Earth Rated caught the jury's attention with its unique vision and, above all, its ability to transform everyday pet necessities into extraordinary things. "We took a basic product, like dog waste bags, and turned it into a brand," said co-founder Massimo De Palma during his acceptance speech.

He also showed the audience a picture of the team members – each with their dogs – and emphasized that Earth Rated's success had been a collective effort.

"It is a poop bag. But, I can guarantee you that you have never met an angrier person than one who has poop on their hands. We ensure this does not happen and that is our brand," he concluded.

### A journey of innovation and impact

Earth Rated's mission has always been to make life easier for dog lovers while supporting the environment. With this vision in mind, Earth Rated has grown to sell its products in over 40 countries.

A key turning point came in 2023 when the company launched its Innovation Centre in Montreal. This center has accelerated product development and enabled Earth Rated to refine its offerings and perfect customer service. The company also launched its own grooming line and specialty wipes made with sustainable materials.

***Earth Rated caught the jury's attention with its unique vision and, above all, its ability to transform everyday pet necessities into extraordinary things.***



Earth Rated is committed to sustainability and has hit milestones such as PEFC certification, which promotes sustainable forest management, for its dog toys, while its wipes packaging is FSC (Forest Stewardship Council)-certified.

The company has also made significant contributions to the community and donated hundreds of thousands of poop bags, dispensers and other essentials to shelters and rescue organizations.

### Building a global presence

Earth Rated's international strategy is based on long-term relationships with partners and distributors. One example is the partnership with Fressnapf, which began in 2018 and has made Earth Rated a category leader in many European markets.

This accomplishment was further highlighted last year when the company was named one of Germany's Top Pet Brands in the bags category.

The company has always taken a different approach to its marketing strategies than its competitors. During its Run New York campaign, brand ambassadors engaged directly with dog owners in New York City parks, distributing poop bags and creating memorable experiences. ♦



## Farm Company ITALY Deluxe functionality for dogs

Farm Company launches its 2.0 version of 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 an increased control of their dogs, reflective inserts on nylon tape, and a multifunctional leash that can be used either as a training leash or as a running leash.

**Farm Company Srl**  
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## pet-earth GERMANY Always the GOLDEN choice: pet-earth bentonite cat litter

pet-earth's GOLDEN Originals cat litters are crafted from premium bentonite, renowned for its high absorbency and direct clumping properties. The bentonite's fine texture ensures a soft feel on sensitive paws. This natural product offers immediate moisture and odor absorption, making it both economical and efficient. Notably, 14 kg of this product is equivalent to approximately 42 kg of conventional cat litter.

**pet-earth GmbH**  
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## Schulze Heimtierbedarf GERMANY The best natural cat litter made from grass, corn and yucca

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KORMOTECH

Topic #2  
**A look back  
at the last 25 years**



**Panel discussion**



Fressnapf, VAFO & Moderna



**GlobalPETS  
Forum**

Moderated by  
**David Palacios Rubio**  
Editor-in-Chief, GlobalPETS

AGUE 2025

## Facing the future: industry leaders on the long-term evolution of the global pet business

One of the highlights of this year's GlobalPETS Forum saw a panel of industry leaders brought together to review the past 25 years – as well as discuss the future shape of the pet business. Here's what they had to share.



**David Palacios Rubio**  
*Editor-in-Chief  
GlobalPETS*



**Dan O'Connor**  
*Business Reporter  
GlobalPETS*

In case you could not make it to Czechia, we've brought together a selection of comments from a trio of leading lights on how the industry has changed, what makes it unique – and what lies ahead.

### 25 years ago...

Since the first GlobalPETS Forum (GPF) was held in 1999, the industry has changed significantly.

Chantal Saelen is Managing Director of Moderna Products, a Belgian plastics manufacturer that

exclusively produces pet supplies. She's worked in the industry for more than 30 years after taking over the family business. By the late 1990s, she'd had some time to settle in.

"The retail landscape was becoming better organized, bigger – actually, the whole industry was getting more professional," she said. "I remember from my childhood, seeing customers of my parents; a lot of them had a business that started as a hobby and ran out of hand."

But around the turn of the century, she said the European pet market as we recognize it today was forming. Torsten Toeller, the founder of German pet supply chain Fressnapf, echoed this observation. "During this period, the shift from mass to specialist pet retailing began to take shape, driven by a growing customer demand for premium products," he said.

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*The panelists wrestled with whether consolidation is making the modern pet industry harder to break into.*

### Is the window of opportunity shrinking?

The panelists wrestled with whether consolidation is making the modern pet industry harder to break into. "The pet industry is likely to experience continued consolidation, with private equity investment driving this trend," Toeller said. "Large players will dominate, leading through innovation and scale, while smaller businesses may struggle to keep up."

But Pavel Bouška, Chairman of Czech pet food producer Vafo, said starting small is still doable. "My first tendency is to say it's completely different, and today it's much tougher [to start a pet industry business]. We have much stronger players, and without concentration and big resources, you are not able to compete. But then I think twice," he said, before reflecting on the smaller brands that have been bought up recently.

"It is still possible to start a good pet business and get it to the right size, even starting with rather small resources," he added. "However, once you get to a

certain size, things get much tougher. There are many more challenges, more regulation and other factors that make it a little bit more challenging."

### The industry advantage

Many of the faces who were a part of the industry years ago are still working in the sector. Saelen and Bouška chalked this up to a unique emotional advantage of working in the pet business.

"We are not so much interested in short-term or one-shot deals, so you tend to build those relationships with different companies," Saelen said of her company. "But what's specific about the industry is the extra layer of emotion because it's pets, it's living – it's almost human."

She added that while most industries work with products, it's easier for executives to feel an emotional tie to an industry that serves animals and their owners. That may have business advantages.

"I think it's valuable that a lot of knowledge stays within the industry because when people leave the industry, it's also knowledge that disappears," she said. "It takes a while before everybody understands a new industry, so it's good that a lot of people stay around in different functions."

Bouška said that while data analysis has helped improve the pet industry, there's more to success than that. "You have to be able to make a strong position on something," he said. "So, that's also different in our industry. I believe emotion and passion are the differences."

### Following trends and going global

Bouška said he remembers an earlier GPF in Venice, where he learned from another executive.

"I remember him talking about the development of the pet business and how it was going to follow the food industry," he said. "It was going to become much more concentrated." Sitting in the audience, Bouška recalled thinking: "Yeah, maybe, but it will take some time."

"And here we are today," Bouška said. "A lot of the things he outlined were actually very good." Bouška said he also learned how to globalize from another past



presenter. "Forget the differences, concentrate on the similarities," he said.

### Pet industry, 2050...

With new technologies, including AI, and scientific advances in nutrition shaking up the pet industry today, change is certain to come in the next decades. The panelists have all witnessed significant change already, with the rise of e-commerce and consolidation. They each shared their outlook on the pet industry 25 years from now.

"I truly hope there will still be an added value from humans interacting and that not everything is going to be automated or virtual," Saelen said. "Our industry might look totally different in 25 years."

Toeller said he expects specialty retailers to continue to grow, while mass retailers may struggle to dominate the pet market. "Omnichannel strategies will remain central, as seamless integration between digital and physical retail will become the industry standard," he added.

However, it's possible that in already saturated markets, industry growth can only go so far. "I have to unfortunately say that I don't believe that in the next 25 years, we will have such growth," Bouška said. "Maybe we will stagnate a little bit more in the future." He emphasized that he would work to maintain the passion that drives the industry.

"I believe and I hope, and I will do everything in my power, that we will still keep the emotion in the business and continue thinking of pets first," he said. "I have great hope in this respect. When I see our younger colleagues or the fresh acquisitions we've made, where we have younger teams, I believe that this emotional side of the business is very constant."

While it's unclear what 2050 will bring, 2026 will be here soon — and the GPF will travel to Istanbul from 20-22 January. ♦

*"What's specific about the industry is the extra layer of emotion because it's pets, it's living — it's almost human."*



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## Opportunity knocks in the US fish and reptile market

**The ownership of aquatic and reptilian companions in the US has remained stable since 2010. But, as a new report shows, there are still ways for retailers and brands to tap into this vibrant segment.**



**Paula Flores**  
Contributor  
*PETS International*

Following the surge in pet ownership during the pandemic, the trend in the US has normalized across all pet segments. In 2010, 62% of households owned at least one pet of any kind, and in 2024 that had barely changed at 63% (equivalent to an estimated 82 million US households). The aquatic and reptilian segment largely mirrors this relatively steady overall pattern.

### Stable populations

An estimated 16 million US households owned fish and/or reptiles as pets in 2024, making this category the third most popular type of pet after dogs (58 million) and cats (40 million).

For freshwater fish, ownership has slipped slightly, from 10% of households (12 million) in 2010 to 7% of households (9 million) in 2024. The trends for

reptiles and saltwater fish are both stable, remaining unchanged at 4% (6 million) and 1% (1 million) of households, respectively, between 2010 and 2024.

### Steady market with unrealized potential

These figures are according to the latest data from the American Pet Products Association (APPA). The strategic findings from the national pet owner survey in APPA's 2024 Fish and Reptile Report reveal interesting insights into how owners care for and engage with their aquatic and reptilian pets.

These insights can help retailers and brands to identify new opportunities for growth in the fish and reptile segment, despite the stable growth rate.

Most American fish owners keep between 1 and 5 fish, with a rising preference for 2 to 3 among freshwater fish owners. Importantly, the report signals strong market potential, with 77% of fish owners planning to purchase new fish in the coming year.



Although often seen as niche pets, reptiles have firmly secured their place in millions of American homes. Turtles and lizards each make up 36% of the reptile population, followed by snakes (18%), frogs (10%), and other exotic species. While turtle and tortoise ownership has declined from 47% to 36%, lizard ownership, notably, has surged from 26% in 2018 to 36% today.

### Deeper emotional bonds

The survey reveals that US pet owners are becoming increasingly attached to their fish and reptiles and are keen to ensure their wellbeing even when they are away. Over half (51%) of fish owners leave their pets with family or friends, ensuring that their care routines remain consistent. Similarly, half of reptile owners turn to trusted connections for pet care when they are traveling.

This deepening emotional connection extends beyond daily care. Testament to the strong bonds between humans and their pets, fish and reptile owners are increasingly providing for their pets in their long-term planning.

Nearly half (49%) of reptile owners have named a caretaker for their pet in their will, showing a commitment to their wellbeing beyond their own lifetimes. Similarly, there is a rise in the number of people making provisions for their fish in their wills, particularly among owners of freshwater fish (42%).

### A key role for retailers

Retailers play a crucial role in educating current and prospective pet owners about fish and reptile care, according to the report. The importance of physical pet stores has grown significantly over time, with many reptile owners relying on pet store staff for information and advice (37%). For more than 6 in 10 fish owners (65%), retailers are the go-to source to learn about the availability of fish – a trend which has grown significantly over time (up from 59% in 2018).

And retailers are not just key in providing information. The number of fish owners purchasing fish from fish stores has risen over time, from 27% in 2018 to 37% in 2024. Specialized fish stores dominate among saltwater fish owners in particular (44%), while pet superstores

***Snake owners are increasingly turning to social media for information about their pets (up from 7% in 2018 to 27% in 2024).***

(35%) or specialty shops (33%) are the preferred options for owners of freshwater fish.

Reptile owners, on the other hand, tend to get their pets from pet superstores (23%). This is an interesting insight for retailers, particularly as snake owners tend to spend an average of \$223 (€216) on a reptile, double the amount they did in 2018 (\$106/€103).

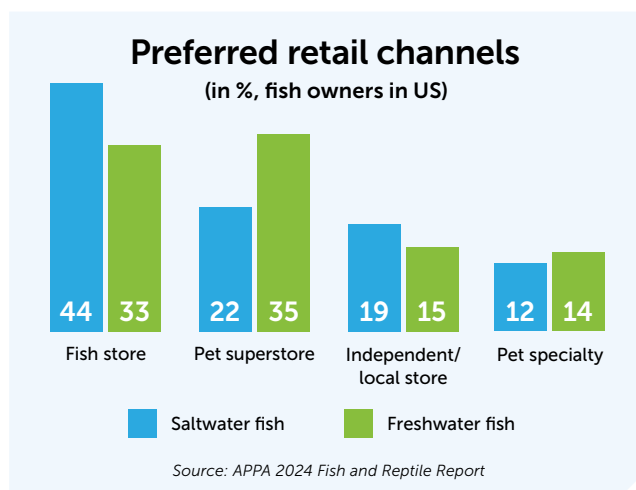
Testament to retailers' relevance is the fact that more fish owners are buying supplements and conditioners from fish stores. In fact, the number of owners purchasing supplements from retailers grew from 25% in 2018 to 38% in 2024.

Reflecting a shift in consumer shopping habits, local pet specialty stores are losing ground to larger retail chains. For example, pet superstores are the preferred outlets for purchasing reptile food and treats, followed by pet specialty chains. There are some exceptions to this trend, particularly among turtle and tortoise owners, who are increasingly turning to specialty stores for treats.

### Online vs in-store purchases

In-person shopping remains dominant for essential purchases like aquariums, but online shopping is becoming more prevalent.

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As an example, 45% of saltwater fish owners now buy food online, up from 37% in 2020. E-commerce is also increasingly preferred when it comes to medications (56%) and even tanks (44%).

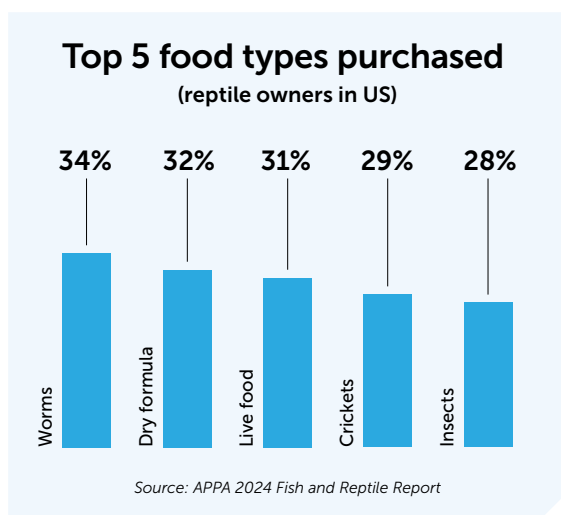
Interestingly, online shopping for reptile food is losing popularity. This suggests a preference for the in-store experience when it comes to purchasing food such as insects, worms and live feed.

### The social media effect

Social media is also gaining traction, particularly among reptile enthusiasts. Snake owners are increasingly turning to social media for information about their pets (up from 7% in 2018 to 27% in 2024). Meanwhile turtle and tortoise owners are also leaning more on social media as well as on retailers. As more owners are turning to online communities and influencers for advice and inspiration, this could offer valuable marketing and communication possibilities for retailers and brands.

### A holistic approach to health

Over the years, health and wellness have become higher priorities for many fish and reptile owners, fueling growth in the aquatic and reptilian medication and supplement market. Among fish owners, a rising number of purchases were made between 2018 and 2024 of fish medications (up from 23% to 33%), supplements (from 33% to 46%) and water conditioners (from 52% to 66%).



Similarly, reptile owners are investing more in the health of their pets. The percentage of reptile owners giving medications to their pets has doubled from 12% in 2018 to 24% in 2024. Powdered vitamins and supplements are particularly popular among lizard owners, with 66% of them embracing these products.

### Pet gifting taking off

Perhaps surprisingly, more fish and reptile owners are purchasing gifts for their pets, particularly for birthdays and holidays. Nearly 7 out of 10 (66%) reptile owners buy gifts for their pets at least once a year.

Additionally, more fish owners are also buying gifts for at least one occasion, with birthdays (17%) and Christmas (16%) leading the trend. Saltwater fish owners are more likely to indulge in pet-related gift-giving than owners of freshwater fish. This emerging trend of pet gifting holds opportunities for retailers.

Beyond buying products for their pets, nearly half (47%) of reptile owners purchase pet-themed items, further reflecting the deep emotional connection between pets and their owners. Therefore, fish and particularly reptile-themed merchandise could be an interesting avenue for brands to explore.

### A developing marketplace

The bond between fish and reptile owners and their pets is stronger than ever. As trends continue to evolve, both retailers and manufacturers have the chance to capitalize on an expanding market by developing products and services that cater to their unique needs. ♦



Regional report: Middle East

## Local pet players seize potential offered by shifting demographics



**Saudi Arabia and Oman have emerged as key Middle East markets as changes in cultural perceptions and disposable incomes have led to rising pet ownership.**



**Katy Gillett**  
*Contributor*  
*PETS International*

Rapid urban development and the increasing acceptance of pets in Saudi Arabia are fueling demand in the country for pet products. Meanwhile, Oman's market is shifting toward premium pet care and sustainability, backed by government incentives and changing consumer behaviors.

### **Saudi Arabia: rapidly evolving**

The kingdom's pet industry has transformed significantly in recent years, reflecting broader cultural and economic changes. Traditionally, pet ownership was limited due to religious and societal norms. But a younger, more globally connected population is driving demand for pet products and services.

"Saudi Arabia has changed culturally," says Nawaf Tabbaa, Chief Marketing Officer at Muntajat, founded as Pet Products Trading Company in 2005. "Gen Z and the younger Saudis have been exposed to international mindsets through social media. Before, the older generation were always afraid of pets, especially dogs, because of their religious beliefs."


The median age in Saudi Arabia is now just 29.6. "10 years ago, they were teenagers without any decision-making power, but now they own their own homes and are more open to having pets," Tabbaa explains.

### **From expats to Saudi customers**

Rachel Start, Commercial Director of Expat Logistics and Bayt Al Aleefa, companies that specialize in pet relocation and retail, agrees that the kingdom has changed drastically in the 19 years that she has been living there.

She set up Expat Logistics with her husband in 2009, followed by Bayt Al Aleefa in 2018, which a Saudi partner owns. "Now it's quite trendy for the young Saudi guys to have a big dog... There are even dog cafés now. It has opened up," she says.

When Bayt Al Aleefa launched, few online pet retailers were active in the country. Today, there is a growing consumer preference for convenience with delivery and online shopping. While physical stores remain important, the ability to offer fast home delivery is necessary amid increasingly urban lifestyles in Saudi Arabia.



Bayt Al Aleefa has expanded its physical store and warehouse to meet increasing demand, but 85% of its sales still come from online channels. “If people want to pop in or browse, look at a bed or something they actually want to feel before they buy, they can do that,” says Start.

Customer demographics have also shifted. Start explains: “When we started, 100% of our customer base were expats. Now, probably around 30% are local Saudi customers.” These factors allowed the business to go from strength to strength in the first 5 years, growing 60–70% year on year (YoY). It still enjoys 20% annual growth.

### Consistent growth

Muntajat, the country’s largest pet-related products supplier and distributor, had a similar trajectory, with 50% growth in sales in 2020 and 2021, followed by stable annual growth of 15% YoY. In November 2023, the company announced it had secured an investment of up to SAR80 million (€20.5M/\$21.3M) from Aliph Capital, an Abu Dhabi-based private equity fund. Tabbaa said this deal did not go ahead due to a “lack of chemistry and understanding”.

The company now serves 1,200 B2B accounts, supplying over 2,700 retail and e-commerce stores, which Tabbaa says includes 95% of the Saudi market. Last year, it also launched a drop shipping product that enables e-commerce businesses to enter the pet market without holding inventory. “In 2024 alone, 25 new e-commerce companies started using our service,” he adds.

### Challenges ahead for the kingdom

According to Start, there are numerous challenges to running a business in this market. These include tight margins, increasing regulatory costs – particularly for foreign-owned companies – and supply chain issues. Tabbaa agrees about the margins and says that while Saudi Arabia now has almost 175 e-commerce pet stores, only 20 generate more than SAR100,000 (€27,000/\$26,000) in annual revenue.

Tabbaa does believe there is plenty of room for growth, however. “In 2024, e-commerce sales [in the pet industry] reached \$50 million (€48M), when it had only

been \$22 million (€21M) in 2023,” he says, adding that \$25 million (€24M) of this was generated by amazon.sa and Ninja, a local grocery delivery company.

That is why Muntajat’s priorities moving forward are to enhance efficiency within the market, provide better services and ultimately increase the number of pet owners in Saudi Arabia – rather than solely focusing on expanding sales.

***Dog ownership dominates in Oman with 60% of pet owners having dogs and 35% cats, whereas in Saudi Arabia cats are more popular.***

The company targets 100% growth within its service-based offerings in the next 3 years, particularly in industry support and e-commerce facilitation. “It’s about creating services in the market for pet ownership,” says Tabbaa.

The strategy ties in with governmental campaigns to promote animal welfare. It also aligns with the Saudi Made initiative, which provides incentives for domestic production as part of the country’s Vision 2030, a national road map that incorporates economic diversification, sustainability and food safety goals.

### Local vs imported brands

According to Muntajat, since 2023, 3 new pet food factories have opened in Saudi Arabia, producing their own brands. And Jeddah-based Delicious Food Factory has announced the construction of “the largest pet food factory in the Middle East”. With a total area of 55,000 sq m, this Riyadh plant will have an annual production capacity of 60,000 tonnes of dry food and 40,000 of wet food. It is expected to be completed by late 2026.

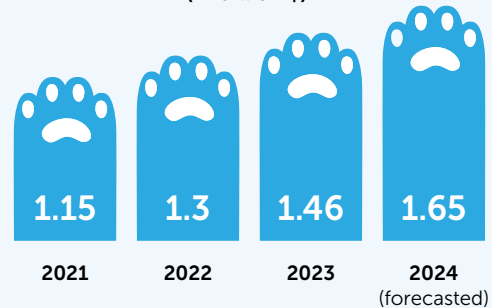
Although Start says that Bayt Al Aleefa’s customers still prefer premium imported brands such as Royal Canin, Hill’s, Schesir and Taste of the Wild, locally made brands like Horayra and Wolfres are gaining traction, competing on affordability and cultural appeal.

While the kingdom’s market is expected to grow exponentially, industry players still

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### Middle East and Africa pet care market size (in billion \$)



Source: Euromonitor International

stress the need for improved pet welfare regulations and infrastructure. Tabbaa also believes there's a lack of structured, large-scale pet businesses integrating strong marketing, logistics and operational efficiency, as the US's Chewy does. "Chewy is a huge company... You don't find this business model in Saudi Arabia. The majority open a store and have someone sell in the shop. That's it."

#### Oman's premium market

In Oman, pet ownership is more established than in Saudi Arabia and the market is characterized by a strong preference for premium products and a more transparent regulatory framework. Maryam's Pet, the country's first subscription-based online pet store, claims that in modern-day Oman pets are considered to be family members.

This change in attitudes has been fueled by higher disposable incomes, growing awareness of pet wellness and social media influence. As a result, the demand for premium pet care products has increased. That has led to growth right across the industry.

Maryam's Pet has seen 15-20% month-on-month growth in subscription-based sales since its inception in 2022. It also has a 40% customer return rate. This growth is further buoyed by the Omani government's commitment to supporting small businesses through tax incentives and entrepreneurship programs, aiding market expansion.

"Sales have risen by 25%, with a 40% surge in premium product inquiries," the company reports. "Most of our customers prioritize high-quality products and will willingly invest in the best for their pets, even with budget-friendly options available."

While 80% of these products are currently imported, Maryam's Pet anticipates a shift over the next 3-5 years toward more locally produced pet products, to align with growing sustainability demands. "Our website already features local brands like [cat litter brand] Kitty Klay, with more to come as we expand our selection."

#### Urban cats and rural dogs

Tabbaa says that Muntajat, which offers services across the region, has noted steady growth in the Omani market, although it's slower than in Saudi Arabia. "They have good awareness of premium pet food [in Oman]," he explains. This is in stark contrast to Saudi Arabia, where the preference tends to be for affordable brands such as Applaws, he adds.

Dog ownership dominates in Oman with 60% of pet owners having dogs and 35% cats, whereas in Saudi Arabia cats are more popular. Dogs are prevalent among outdoor enthusiasts and families with villas, whereas cats are favored in urban areas due to fewer maintenance needs.

Trends indicate a steady rise in cat ownership, driven by urban living and apartment-friendly pet preferences.



***Building trust in Oman's e-commerce market remains a challenge, as many customers still prefer physical stores.***

"Small pets like rabbits and birds are also common. Additionally, there is a growing openness to adopting rescue pets, a trend that we strongly support," says Maryam's Pet.

**Bricks and mortar most trusted**

Where Oman lags behind its Gulf neighbors is in e-commerce. Building trust in Oman's e-commerce market remains a challenge, as many still prefer physical stores, according to Maryam's Pet. The company does expect online shopping to become increasingly popular in the near future, alongside premium pet care services, subscriptions and eco-friendly products.

"Personalized communication, customer engagement and testimonials play a key role in building credibility.

We also cater to remote areas with high-quality products and offer free shipping across Oman on orders above OMR30 (\$78/€75)," the company states.

**Ready for more business**

Their different dynamics notwithstanding, both Saudi Arabia and Oman offer opportunities for pet businesses.

Saudi Arabia's market is defined by rapid growth, increasing pet ownership and a booming e-commerce sector, although challenges such as regulatory constraints and inconsistent government support for retailers persist.

Oman, in contrast, offers a stable, premium-focused market and a growing inclination toward sustainability. With continued investment, regulatory improvements and continuously evolving consumer behaviors, the pet industry across the region is poised for sustained growth. ♦

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Abdulrahman Alkhan, Managing Director, Pet Arabia

**“Many stores in the region don’t have a strong brand identity, they just compete on pricing”**



At the helm of a company riding a wave of evolving attitudes toward companion animals, as well as an increasing demand for higher standards in pet retail, Pet Arabia’s MD shares his vision for continued success across the Gulf states.



**David Palacios Rubio**  
*Editor-in-Chief*  
*GlobalPETS*

Abdulrahman Alkhan was originally a banker – an unusual background for someone who is now so passionate about the pet industry. But, as a dog owner, he found the toys available in Bahrain were poor quality and spotted an opportunity to create something new.

In 2009, after spending some time researching and learning about both materials and pet nutrition, he opened his first pet shop. Pet Arabia is active in Bahrain, and the company recently opened a store in Riyadh, the capital of Saudi Arabia – a fiercely competitive environment.

***How would you describe the pet retailing landscape in Bahrain?***

The landscape in Bahrain is constantly changing, with many pet retail stores opening, but just as many of them shutting down quickly, too. Unlike flower shops, electronics stores or clothing retailers, simply displaying products on shelves doesn’t guarantee success.

I would estimate that there are now at least 55 pet stores in Bahrain, including our 5 branches. When Pet Arabia started 15 years ago, there was only one pet shop in the whole country and that was more like a farm.

My goal was to create a pet store where families could shop comfortably in a clean, pleasant-smelling environment, similar to the experience of shopping for themselves.

***Tell us more about your stores...***

We have 5 stores in Bahrain, ranging from 40 to 400 sq m. If we do our job properly, size doesn’t matter much – it’s about the experience and service. So if we don’t have a product in one location due to space, we source it from another branch or our warehouse.

Our first shop was a standalone villa that we converted into a commercial space with a garden. It has a cozy, home-like feel, and we still use it for events like pet-friendly tea parties. Other locations include a basement store in a mall and a branch next to a high-end supermarket where customers can buy pet supplies alongside their groceries. Each location serves a different purpose – we don’t rely on a single model.



***You were the first to introduce professional pet grooming in the country...***

Grooming simply didn't exist here in Bahrain. I had a hard time convincing the government to grant me a commercial license for pet grooming, because they had never heard of it before. I had to show them photos online and explain the process.

Then I had to show them that there would be a table, a dog on it, and a groomer working on the pet. I had to take them through every detail. Eventually, the Ministry of Industry and Commerce created an official activity classification for pet grooming, allowing me to launch the service in 2010.

***You're also present in Saudi Arabia. Is that a tough market to break into?***

Yes and no. We've been distributing in Saudi for a long time, so we have insights into the market, but this is our first physical retail store there. Saudi is a unique market – it's not like Bahrain, Oman or Qatar. The consumer mindset is different and the current standards are low.

Many customers don't know the difference between high-quality and low-quality pet products, even if they can afford them. Their perspective is often: "Why should I pay more if it looks the same?" The real difference becomes clear in services. That's where we stand out. Our groomers are professionally trained, they understand pet anatomy, they follow international breed standards and we maintain strict hygiene protocols.

***What can you tell us about the pet culture in the region?***

Pet culture here is different. People don't often take their dogs out for walks. So as an outsider, you might assume there are no pets here. But that's not the case. People do own pets – they're just not visible in public spaces.

Customers often come in with little knowledge about what they need, what works best for them or even what's available on the market. They require guidance throughout the process. Many pet stores don't provide that, nor do they have a strong brand identity. Instead, they compete heavily on pricing – a dangerous game. Compete solely on price and someone else will always undercut you, which might easily drive you out of business.



***Can you walk us through the consumer journey at Pet Arabia?***

The average basket value has changed since COVID. Like in many other markets, there has been a big shift towards online shopping. In terms of product categories, we've seen a noticeable drop in spending on accessories – things that aren't essential. At the same time, that's been compensated [for] by a much higher demand for treats and wet food, which weren't as popular before.

Another interesting shift is in-store behavior. Previously, many customers just wanted to get in and out quickly. Since COVID, we've seen a different pattern – customers now take more time in the store. They're more willing to browse and even wait while their pets are being groomed.

[▶ SEE NEXT PAGE](#)

***"I had a hard time convincing the Bahrain government to grant me a commercial license for pet grooming, because they had never heard of it before."***





### ***So customer education is a core part of your business model?***

When it comes to human food, people are expected to understand nutrition and read labels. But with pet food, they expect us to guide them. What's best for their pet? When to feed it? How to switch foods? Because there's little public discussion about pet care, people rely on us for that information.

That's also why we've been successful for 15 years. We understand that it's not just about stocking shelves and hoping products sell. If we did that, we'd be in direct competition with Amazon and other online retailers on price alone. Instead, we differentiate ourselves by creating an experience for customers and training our staff to provide expert advice.

### ***Can you share more details about your SKUs?***

In our stores in Bahrain, we have around 8,000 SKUs. Plus, we distribute pet products in over 120 locations nationwide at the moment. In Saudi Arabia, we currently have 1,490 SKUs, and we are gradually expanding that number. This lower coverage is mainly due to product registration.

In Bahrain, you just need an import permit, and that's it. In Saudi, you need to register the food and hygiene items separately. They need to be in a separate warehouse, and each needs a license. So it's not a straightforward import process.

### ***How do you differentiate when it comes to the product offering?***

One key difference is our product selection. We don't carry anything with artificial flavors, colorants, chemical preservatives or high fillers. Each and every treat and food product goes through a filtering process before it makes it onto our shelves.

This means that customers can trust that whatever they pick – even if it's a blind choice – meets a certain quality standard. This approach is different to how a marketplace like Saudi Arabia usually works, with distributors flooding the market with all kinds of products and waiting to see what customers buy.

### ***Do pet parents in Bahrain prefer specialist retailers or grocery stores?***

I think most consumers – cat owners in particular – prefer going to grocery stores or supermarkets because of convenience. Dog owners, on the other hand, tend to go more to specialty stores because they require other items, not just food.

That said, dog food still sells well in supermarkets. But when we started 15 years ago, the percentage of pet food sold in supermarkets was much higher.

In places with fewer pet stores, like Qatar, the vast majority of sales of pet products and food comes from vet clinics. That's because there aren't many professional pet stores. The landscape is changing there, as 2-3 new stores opened recently and customers are becoming more aware of them.

### ***Are supermarkets in Bahrain increasing the shelf space dedicated to pet products?***

Supermarkets work with high registration fees and want guaranteed sales. So they were open to selling cat litter and food, but hesitant about accessories like brushes. But when we created demand, they started giving us bigger spaces. We work with supermarket chain Carrefour, designing and implementing the whole pet section in its 11 locations.

***"My plan is to go more into subscription-based models and have smaller shops that cater for members only."***

**How much does online contribute to your sales revenue?**

Online is still relatively small, making up about 20% of our business. The online channel does have huge potential. In this region – Bahrain, Saudi Arabia, Qatar and other Gulf countries – there's a heavy reliance on third-party apps like Talabat, which is owned by Delivery Hero in Europe.

I'd like to stress that Pet Arabia isn't just retail and e-commerce. A big portion of what we do is distribution and export. That division has been growing steadily. We started it about 5 years ago, and now it accounts for over 70% of our business, with a strong upward trajectory.

This growth is being driven by the expansion of pet stores and vet clinics across the region, especially in Saudi Arabia. Riyadh alone now has over 800 pet-related businesses, and most of them opened in the past 2-3 years. We are also actively expanding our distribution in Qatar and Oman, reinforcing our long-term vision beyond Saudi Arabia.

***"Riyadh alone now has over 800 pet-related businesses, and most of them opened in the past 2-3 years."***

**How's the future looking for Pet Arabia?**

My plan is to go more into subscription-based models and have smaller shops that cater for members only. In Saudi, specifically, we want to cater to neighborhoods while minimizing the number of staff needed – which keeps costs down. We recently introduced a membership program called BathClub, that already has around 400 active users. This initiative has helped us build a community around our brand and drive more people to our website.

Subscribers get unlimited access to selected pet grooming services, depending on their membership tier. Members receive a welcome pack with a special tag for their pet, a membership card and exclusive discounts on certain services and products. The plan is to scale up this service significantly in Saudi Arabia, as it is a much bigger market. ♦



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# What are the effects on the pet industry of inflation stabilization?

As inflation continues to level off from its historic 2022 high, PETS International takes a look at where and why prices are now changing in regard to the global pet sector.



**Dan O'Connor**  
*Business Reporter*  
*GlobalPETS*

Around the world, inflation has dropped significantly from its recent peak, when the impacts of pandemic-era disruptions coincided globally to cause a surge in prices. Pet industry inflation – dubbed ‘petflation’ by some frustrated consumers – has come down in many areas, but not without leaving its mark on the industry.

## Keeping afloat amid falling sales

The ongoing socio-economic and political consequences are manifold but, in the pet industry, the inflation wave struck unevenly across different sectors and is still causing headaches for consumers and companies, even as the outlook brightened in 2024.

“Inflation has driven a lot of pet businesses, whether it’s brands, service providers or bricks and mortars, to increase their prices just to stay open,” pet industry Marketing Consultant Jolanta Smulski, co-founder of the Pet Industry Network, says. “It’s not even about making a profit, necessarily, and it’s really affected the pockets of pet owners.”

The inflation wave that peaked in the US and Europe in 2022 drove lower sales for some companies, as consumers grew more cautious about spending on increasingly pricey pet goods. In 2024, however, petflation cooled significantly – but only in some sectors of the industry and unevenly across markets. Pet food inflation is declining more steeply than many other consumer goods categories. However, some unavoidable expenses like veterinary costs remain high.

## US price change variations

In the US, inflation on pets and pet product sales declined by 0.9% from December 2023 to December 2024, and by 0.4% in the final month of last year, according to the Bureau of Labor Statistics (BLS). That’s down from a peak of 12% year-on-year (YoY) inflation in November 2022.

The decline was driven by pet food, which saw inflation drop by 1.7% last year. That put the sector into deflation territory for much of the year – prices dropped during 8 of the last 12 months. Meanwhile, prices in other pet categories continued to rise in the US. The prices of pets, pet supplies and accessories increased 1.5% YoY, while veterinary and service prices rose 6.2% YoY.



## Deflation poses a challenge

Lower food prices are a welcome relief for many consumers but could pose challenges for manufacturers and retailers. Deflation can reduce profit margins for corporations relying heavily on pet food sales. If sustained, declining prices could force production cutbacks or layoffs.

## No real universal trends

Pet food prices are returning closer to normal as the industry adjusts to the supply chain changes and increased wages that contributed to high costs over the past few years.

Similar consumer price numbers have been reported around the world. In Spain, pet products declined by 0.4% for the year, while veterinary service costs increased by 3.1%. In Canada, pet food and supplies inflation declined by 3.2% from December 2023 to December 2024.

The trend is not universal though. In France, pet product prices increased by 1.8% in 2024, and in the Netherlands pet goods prices increased by 0.4%, though overall inflation remains high in the country at 4.1%. In the UK, the Retail Price Index (RPI) for pet care dropped from a peak of 12% in 2023 to 3.6% in 2024, slightly above the overall RPI of 3.5%.

## Comparing to other fast-moving goods

Barring veterinary costs, pet food and product costs have experienced more sharply declining inflation than many other similar consumer goods. In the Netherlands, for example, many fast-moving consumer goods (FMCG) categories are experiencing higher inflation than pet goods, including the relevant meat and grocery markets, and in Canada pet food deflated more strongly than most other categories.

In the US, pet deflation of nearly 1% YoY in 2024 stands out among FMCG groups, though some categories like meats and some vegetables also saw sizeable declines. That may have contributed to deflation in pet food,

***Pet goods prices are easing faster than most personal care products and groceries overall.***



as ingredient prices have declined or stabilized. Pet goods prices are easing faster than most personal care products and groceries overall, which still faced slight price increases over the year.

## Veterinary costs still going up

Despite the cooling inflation and an easing veterinarian shortage, vet costs were still rising by the end of the year. Though few countries offer detailed consumer price information on veterinary services, those who do show costs rising above the overall rate of inflation.

Pet services in the US, including veterinary, increased by 6.2% last year, and in Spain – where overall pet product prices declined – vet costs rose by 3.1%. In the Netherlands, vet inflation hit 7.4% YoY in December, down from a mid-year peak of 9.3%.

The high inflation is partly due to complex equipment plus medication that's hard to produce or costly to develop. However, experts have also pointed out other long-term trends in the vet industry that could be pushing up the prices.

## Understanding high vet expenses

Pete Scott, President and CEO of the American Pet Products Association (APPA), says that while the rest of the industry adjusts to high wages and supply chain disruptions, the expense of getting into the veterinary sector is likely to drive up costs.

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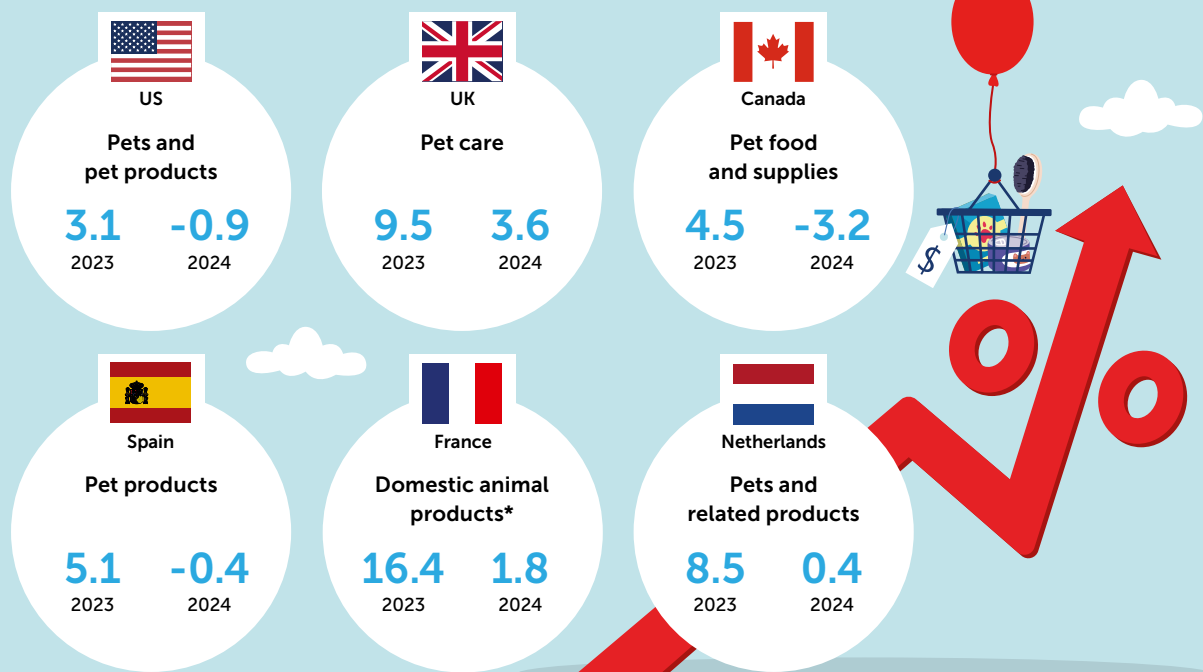
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## Pet inflation overview

(December, 12-month change, %)



Sources: BLS, ONS, Statistics Canada, INE, INSEE, CB

\*Pet data not measured monthly – numbers calculated from 2023 and 2024 full-year data.

"When it takes somebody that's an out-of-state student \$300,000 (€288,000) to get through vet school, they've got a lot of debt," he says. He also cites growing corporate ownership of vet clinics, which may be more profit-driven than independent local vets.

Firms like Shore Capital Partners, owners of the recently merged Southern Veterinary Partners and Mission Veterinary Partners, have snapped up hundreds of small clinics in the US, with an unclear impact on consumer prices. A 2023 report by the Journal of the American Veterinary Medical Association found that vets working in corporate-owned practices reported "feeling more pressure than those in private practice to generate revenue and see more clients per shift".

Prices are also generally reactive to how much consumers are willing to tolerate. In an industry that can hold moral weight over consumers eager to take the best care of their pets, veterinary companies could perhaps raise prices to levels higher than shoppers in other sectors would be willing to pay.

### This year and beyond

High inflation has caused belt tightening among consumers around the world. Whether or not that cautious spending continues remains unclear.

Tariffs and other possible political changes associated with the new Trump administration could spike prices, and the uncertainty surrounding the Republican President's return to Washington has already contributed to weakening consumer confidence in the economy overall.

Other elections – and possible changes that come with them – could have similar impacts. But long-term trends in the pet industry, like humanization and premiumization, are likely to continue.

Despite the unclear economic future, Scott says things are generally looking up, as the world moves on from the post-pandemic inflation wave. "I don't think it's going to be a blockbuster year, but I think it's going to be a better year," he concludes. ♦



# Assessing the impact of Amazon policy changes on pet brands

While imposing some restrictions, changes to Amazon's bundling rules in the US – and potentially in Europe, too – will nonetheless create fresh opportunities for pet businesses.



**Martin Heubel**

*E-commerce Strategy Consultant  
Conslterce*

If you're selling products on Amazon, chances are you've heard about Amazon's recent consumables bundling policy change in the US. But what you probably haven't heard is how it's going to affect your business on Amazon.

## An end to mix and match

As the retail giant is rumored to also be lining up similar changes in European markets, let's examine the commercial implications of this change for pet brands selling on Amazon.

Gone are the days when rogue third-party (3P) sellers could create their own variety packs mixing different brands of pet food, accessories and treats.

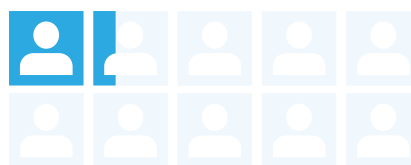
Amazon's bundle policy update in the US, announced in October 2024, effectively bans such practices. Only manufacturing brands will be able to create bundles in the future, and all products in a bundle must be from a single brand owner.

For independent sellers who have long relied on creative bundling strategies to meet consumer demand, this marks the end of their free rein on Amazon.

## Advantages for brand manufacturers

This policy change addresses some of the long-standing concerns of brand owners in the pet industry. With this change comes better control over the presentation of their products on Amazon's virtual shelves. It will maintain the integrity they've worked hard to build by ensuring that their premium dog food, for example, isn't bundled with lower-quality treats from other brands.

## Evolution of Amazon's pet supplies category (2024)



**13% of sellers operate in this category**  
↑ 8% YoY

**↑ 26%**

Revenue increase  
by pet sellers

**↑ 5%**

Average price  
increase in category

Source: Jungle Scout

The pricing landscape is likely to change too. Without unauthorized bundles flooding Amazon's marketplace, manufacturers will be able to better uphold their pricing strategies.

More importantly, data from their own controlled bundle offerings can give them direct insight into consumer preferences.

### Market restructuring implications

Major pet food manufacturers are already positioning themselves to capitalize on this change. Companies that previously powerlessly watched their products appear in unauthorized variety packs can now develop their own official combinations, ensuring quality control while meeting consumer demand.

For retailers and resellers, the story is more complicated. Those who built their business models around creative bundling must now pivot quickly. European vendors will likely be affected next.

With that prospect on the horizon, many resellers are already starting to liquidate non-compliant inventory while developing new strategies to sustain their business.

As with any policy shift, the changes to Amazon's bundling policy not only pose challenges, but also create new opportunities. This is a chance for manufacturers to start developing comprehensive bundling strategies that align with consumer preferences while investing in direct-to-consumer e-commerce packaging capabilities.

### Developing winning strategies

This isn't just about compliance – it's an opportunity to 'premiumize' their offerings and reshape how pet owners purchase multiple products. Effectively, it shows brands a way out from the constant net pure profit margin (Net PPM or 'procurement margin') pressure amid Amazon's low average selling price (ASP) strategy in consumer goods categories.

Resellers, on the other hand, will need to rethink their value proposition. Instead of competing through unauthorized bundles, successful 3P sellers should focus on building stronger relationships with manufacturer brands to develop authorized bundling programs.

This can lead to attractive opportunities for first-party (1P) brands to make ranging decisions in light of more difficult annual trade negotiations – brands might choose to remove unprofitable 1P selection and move it to 3P, or they might use 3P sellers as co-packers for creative bundling opportunities such as advent calendars or brand partnerships. ♦



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## Finding ways to prevent online pet specialists losing market share

In many parts of the world it seems clear that new strategies are needed to retain customers and persuade them to be brand-loyal in the face of stiff competition.



**David Ingemar Hedin**  
*Senior Project Manager, E-commerce*  
*Euromonitor International*

Online pet specialists are classified in the Euromonitor e-commerce database as 'home products specialists'. Currently, they are losing market share to groceries, marketplaces or both. How strong this trend is depends on the market, but the channel isn't performing well anywhere.

### Regional differences

In the US, the biggest global market for online pet care, the online channel lost 1.4 percentage points between 2022 and 2024, with grocery and direct-to-consumer (DTC) emerging as the main winners. This analysis is based on the online shopping behavior of 24 million panelists worldwide.

Some countries, for example Brazil and Canada, have managed to maintain and slightly grow their

percentage share of the market. France, meanwhile, is seeing one of the strongest negative shifts in the channel, with pet specialists losing 9 percentage points between 2022 and 2024.

### Carrefour integrates specialist into grocery

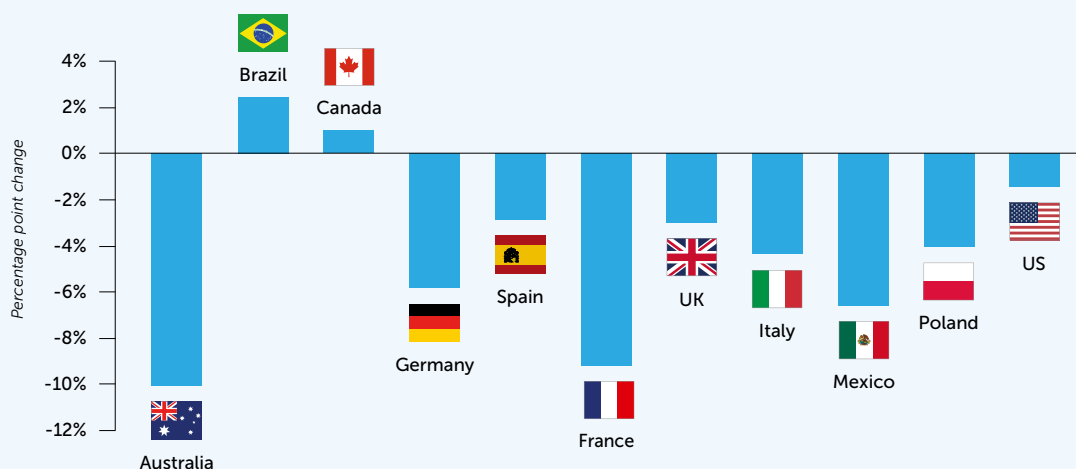
French grocery giant Carrefour is one of the companies that has contributed to the channel shift in the country by, perhaps grudgingly, redirecting all shopper traffic from its online pet specialist Croquetteland to its site [carrefour.fr](https://www.carrefour.fr) since early 2024.

For a while, the specialist's logo lived on as a separate section in the Carrefour category tree, but it has since disappeared via a merger into a single pet section.

While this merger introduces the option for consumers to buy specialist brands such as Royal Canin alongside their weekly groceries, the retailer mainly focuses on its Carrefour private label and other typical grocery brands.

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## Share change for home product specialists in pet care online 2024 vs 2022



Source: Euromonitor International, Passport E-commerce

This was not the original idea when it acquired a majority stake in the pet specialist in 2016. A year later, Pascal Bardot, responsible for the development of Croquetteland at Carrefour, alluded to the \$3.35 billion (€3.2B) acquisition of Chewy by PetSmart in the US while explaining how he was planning to make the Croquetteland site an important player in pet food that consumers would always consider.

### Switching to economy brands

When a consumer switches from online pet specialists to online grocery, that also indicates a switch from premium brands such as Hill's Pet Nutrition, Royal Canin and Pro Plan to economy brands such as Pedigree and Whiskas. If anything, therefore, the move from online pet specialists to online grocery appears to be driven by frugality on the side of consumers, in a business that has historically been resilient to economic crises.

### Promoting subscriptions for loyalty

While it's not too late, pet specialists would benefit from getting more consumers into money-saving subscription deliveries of the brands their pets already like to eat. Once pet owners successfully trade down, bringing them back to the premium brands will be an expensive task.

Independently from pet specialists, strong brands can forward integrate online by launching their own DTC stores. Creating a direct link to its most loyal customers enables a brand to retain them through long-term low prices, while also harvesting data.

### Zoomalia's strategy for success

Zoomalia is an exceptional case among online pet specialists, with a stellar growth performance in the last 3 quarters of 2024. During that time, it lifted the home product specialist channel in France and took 4 percentage points from Amazon, Carrefour and Leclerc Drive.

There are several components to Zoomalia's recent success in activating the increased discretionary spending power of consumers in the light of falling interest rates. The company is a local specialist, deriving most of its revenue in France. It also uses automation and technology to estimate just the right time to suggest a repeat order to consumers, as replenishments make up about 50% of its total revenue.

If an online pet specialist reactivates customers with a call to replenish too early, its email is ignored. However, should the consumer run out of feed, they'll go to a physical store for an immediate refill. But if the call to

replenish – with a suitable discount – comes at just the right time, success is very likely. Zoomalia was recently voted Le Grand Prix Meilleur E-commerçant de l'Année 2025 (best e-tailer) by recruitment specialist Concepteur Vendeur.

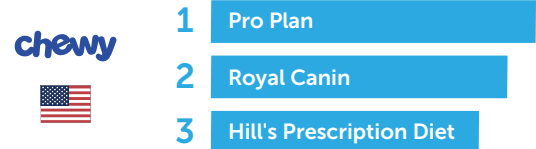
### Finding opportunities for growth

In Canada, where the online pet specialist channel is growing, Pet Valu is the big winner. Its main competitor PetSmart had a decent 2024 overall, but didn't manage to take market share, according to the latest Euromonitor e-commerce data publication in January.

Meanwhile, US-based Chewy, split from PetSmart in 2020, has seen an opportunity to enter the Canadian pet care market.

With its online pure play model in Canada, it hopes to gain market share and perhaps drive the home products specialist channel further, focusing on automated replenishment suggestions and subscription revenue in the same way as Zoomalia. ♦

### Top 3 pet care brands



Source: Euromonitor International, Passport E-commerce



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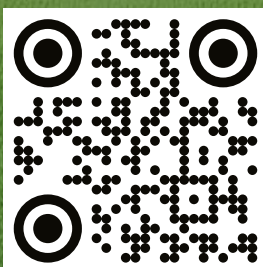
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# More cats and improved products propel global litter business

A rise in the popularity of feline companions is expected to fuel market growth as investment, new materials and tech-driven innovation also boost the cat litter industry.



**Dan O'Connor**  
*Business Reporter*  
*GlobalPETS*

With the cat population increasing in many countries, the market for cat litter products – which according to data from Euromonitor International was worth \$10.2 billion (€9.8B) globally in 2023 – is projected to continue to grow strongly for the rest of this decade.

## Regional growth projections

At a regional level, Grand View Research predicts a compound annual growth rate (CAGR) of 4.1% from 2024 to 2030 in North America, which accounted for a share of about 39% of the global revenues in 2023.

This growth outlook is supported by analysis by Packaged Facts, which found that dog ownership rates in the US declined from 42% to 38% of households between 2018 and 2024, whereas cat ownership rates rose from 23% to 24% of households.

Grand View Research's figures show that the European cat litter market is projected to grow even more strongly, at a CAGR of 5.1% until 2030. This is attributable to increased cat adoption among consumers, with a growing trend towards multi-cat households.

According to the European Pet Food Industry Federation (FEDIAF), more than 110 million cats were present as pets in 88 million European households in 2020.

The highest growth rates between now and the end of the decade are projected in Asia Pacific (a CAGR of 7%), China and India.

In China, for example, the pet adoption rate has increased by almost 50% since 2015 according to the 2021 White Paper on China's Pet Consumption Trends.

The Chinese cat litter products market was valued at about \$762 million (€734M) and is expected to grow at a CAGR of 6.2% until 2030.

[▶ SEE NEXT PAGE](#)



Similarly, the surge in cat ownership has directly contributed to a significant rise in pet product sales, including cat litter products in India. There, the market for cat litter is expected to grow at a CAGR of 8.2% during the same period.

### Ramping up production

Various litter and litter box companies are now gearing up to capitalize on this growth in the sector. For example, Nestlé expanded a Purina cat litter facility in the US state of Virginia in 2023. The \$128 million (€123M) expansion increased bentonite clay production for the company.

Meanwhile, Whisker, an international leader in connected pet care, is preparing for long-term expansion. The company has bought 5 acres of land adjacent to its factory in Wisconsin, although it currently has no active plans to build on the property.

### The search for new materials

Besides the rise in cat ownership leading to higher demand for cat litter, pet parents are also increasingly seeking new litter solutions. This is driving innovation and investment in a sector long dominated by bentonite clay-based litter.

One popular alternative to clay is wood pellet cat litter. The pellets can absorb moisture and are both biodegradable and cheap to produce. They are often marketed as a 'natural' litter solution, owing in part to the often visible grains of organic matter in the product.

### Pros and cons of silica

Another alternative that has entered the market is silica-based cat litter, which offers improved odor control and absorbency. Silica litter can also last longer, meaning a smaller carbon footprint and more value per purchase for consumers.

According to market research company Straits Research, as more consumers try out crystalline litter, there is a shift away from clay in the sector.

While silica has its benefits, dust from the product can be harmful to humans when inhaled, presenting a vulnerability for the category. Nevertheless, Straits Research projects that the segment will see a CAGR of 3.1% until 2029.

One company anticipating this growth is Oil-Dri. This major US manufacturer of clay-based litter acquired silica gel-based crystal cat litter supplier Ultra Pet for \$46 million (€44M) in 2024 to expand both its private label and branded litter-manufacturing activities. When announcing the deal, the company claimed that the silica litter industry saw growth of 500% between 2019 and 2024.

For companies such as Texas-based Alpha Paw and LA-based PrettyLitter, the use of silica has opened up an opportunity to add value to their everyday products. Both companies produce silica-based litter incorporating pH detection, so that the litter changes color based on the acidity of a cat's urine. This dual-use approach supports veterinary health monitoring and can indicate urinary problems before symptoms become obvious.

### Eliminating inconvenience

Innovation in the sector is not just being driven by new cat litter materials. Tech has also made its way into the industry, and a number of businesses offer ways of eliminating one basic inconvenience of owning a cat: the need to clean the litter box.



*The highest cat litter growth rates between now and the end of the decade are projected in Asia Pacific (a CAGR of 7%), China and India.*

One of these companies is the US-based Whisker, maker of the automated self-cleaning solution called the Litter-Robot. In August 2024, Chicago-headquartered investment firm Pondera Holdings was reportedly exploring options to sell its controlling stake in the firm for a valuation nearing \$1 billion (€924.9M).

Not only does the Litter-Robot mean cat parents never have to scoop again, but it also helps them monitor their cat's health and habits, according to Whisker, which claims to have sold over 1.5 million robots so far.

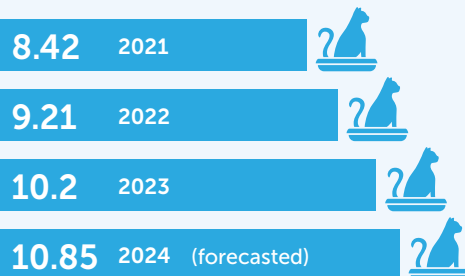
Several Chinese companies, including PetLink and Petkit, have also seized the opportunity to automate litter cleaning. Since such solutions allow consumers to think less about their litter altogether, they represent an opportunity for companies producing long-lasting litter, including silica-based products.

#### Growth expected to continue

The current high price of such machines presents a barrier for most consumers, but mass production could bring down costs over time and increase growth in the sector. In the US, for instance, Grand View Research estimates that automatic litter boxes will see a CAGR of 6.6% compound from 2025 to 2030.

While more players are entering the litter and litter box sector, positive trends in terms of both cat ownership and product development mean that growth is likely to continue. A shift toward cats means more opportunity for feline-focused businesses in a traditionally dog-dominated industry. ♦

#### Size of global cat litter market (in billion \$)



Source: Euromonitor International



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## A feeding bowl for each pet and every need

The pet food bowl segment is thriving, shaped by practicality, AI-powered innovations and fresh insights into potential health uses.



**Ivana Crnec**  
Contributor  
*PETS International*

In 2024, the US pet food bowl market was valued at \$3.7 billion (€3.5B) and this is expected to reach \$5.2 billion (€5B) by 2031, according to a forecast by data analytics company Coherent Market Insights.

### Fast rise of the slow feeder

The slow feeding bowl has gained popularity because it has dual benefits. By delaying eating, it can prevent conditions associated with gulping, such as the life-threatening syndrome gastric dilatation-volvulus. It also offers brain stimulation – an owner's urban lifestyle often means that their pet spends a lot of time indoors, which emphasizes the need for additional mental enrichment.

"In the past, consumers would buy one dog food bowl. Now they buy multiple slow feeder bowls to give their dogs a different enrichment challenge with each meal,"

says Adam Baker, founder and CEO of SodaPup, a US brand that makes slow feeder bowls, lick mats and food puzzle toys.

### XL and traveling dogs

Around 68% of dog-owning US households have a big dog, according to a 2023 survey conducted by MarketResearch.com. In addition, canine-focused online platform Dogster reports that 78% of US pet owners take their dogs on vacation with them. These choices indicate the need for 2 specific products: bowls designed for big dogs and practical, portable bowls for pets on the move.

"We're noticing a growing demand for both extra-large and collapsible dog bowls, especially among pet owners who love outdoor adventures and travel. This trend highlights exciting growth opportunities in the outdoor and travel pet accessory market," says Sinan Sarp Kocabas, Category Manager at Leash Boss, a pet accessory brand based in New York.

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*Innovative feeding solutions are not just for tech-savvy owners. One of the main benefits of these bowls is that they promote health.*

## Automatic feeding solutions

Kenl-Master patented the very first automatic pet feeder in Los Angeles in 1939. Its simple but functional design featured a lid-covered food plate connected to an alarm clock. Today, the smart pet feeder market is booming, with feeders boasting futuristic designs and state-of-the-art technologies.

In 2023, Pet Marvel launched its Automatic 2-in-1 Pet Feeder & Water Dispenser on Kickstarter. Featuring an integrated camera, it offered feeding, drinking and real-time monitoring. In the same year, Chinese electronics multinational Xiaomi introduced a new pet feeder capable of dependably feeding pets in their owner's absence. And in May 2024, California-based Petlibro patented its first refrigerated smart feeder, which keeps wet food fresh until served.

Innovative feeding solutions are not just for tech-savvy owners. One of the main benefits of these bowls is that they promote health.

"There is rising interest in products that provide scheduled, portion-controlled meals – helping to address issues like pet obesity," says Summer Shen, Strategic Planning Manager at PETKIT, an innovative Chinese company that produces high-end smart pet products.

PETKIT offers an automatic pet feeder with an integrated AI-powered camera and a double funnel for 2 types of food. Shen says: "More advanced solutions, such as feeders with AI cameras, allow pet parents to track their pet's eating habits in real time. This gives valuable health insights."

## Material considerations

As eco-conscious pet owners seek out feeding bowls that don't add to their environmental footprint, the materials used can be more important than shape. One manufacturer that can meet this sustainable need is Eha (which means 'our earth').

This India-based, women-empowered pet care brand makes pet bowls from repurposed coffee husks, wheat straws, bamboo and rice husks. These materials lock away biogenic carbon, minimizing environmental impact.

Dorai Home, located in the US state of Utah, produces innovative dog bowls from diatomaceous earth and ceramics – eco-friendly and quick-drying. The company says that today's pet owners are looking for products that are practical but also align with their values, both reducing plastic waste and incorporating stylish designs into their homes.

"Moving forward, we're excited to continue exploring innovative pet solutions that combine form, function and eco-friendly design to meet the growing demand of eco-conscious pet parents," explains Kelsey O'Callaghan, Dorai Home's co-founder. The brand is currently working on expanding its collection with bowls for large dogs and cats.

## Enduring popularity of basic bowls

Despite innovations and advanced solutions, the regular pet food bowl remains a popular choice among many pet parents. It is reasonably priced, readily available, durable and easy to maintain. Plus, it comes in a variety of shapes, colors, materials and designs.

There are many variations of the regular bowl on offer – ranging from designs that adapt to pet mouth shapes to prevent spills and those with raised ridges to keep long doggy ears out of the food, to elevated bowls for pets with arthritis and angled bowl models that support better eating posture.

## Glimpse into the future

The pet food bowl will continue to evolve and adapt to consumers' needs and desires. "I believe that pet parents will become more discerning and have higher expectations of pet brands delivering meaningful innovation that really solves daily problems," predicts Jacob Zuppke, President and CEO at Whisker, a US smart pet products company with over 23 years of experience and more than 1 million customers.

Will the smart feeder end up replacing its ancestor – the standard food bowl? Or will the in-between generations, such as the slow feeders and collapsible dispensers, take over the market completely? It all remains to be seen. ♦

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